



Position: Commercial Lines P&C Account Manager

Job Description: A Richmond-based boutique insurance brokerage is seeking an experienced individual to support its double digit growth. The candidate will be responsible for retaining existing business, strengthening client relationships and assisting producers in winning new business.

About Winters-Oliver: Winters-Oliver is an independent insurance agency founded in 1945. We have an energetic team that is excited about the work we are doing. The office environment is modern, comfortable and professional. Account Managers are provided the latest tools to work at their peak potential. Over the last 5 years, we've reinvented ourselves and now prefer to think of the agency as a 70 year old start-up! We focus on Social/Human Services, Healthcare, Technology, Craft Breweries, Life Sciences/Biotech along with best-in-class business clients from some other industries.

Requirements, Knowledge, Mindset

- Virginia Property and Casualty Insurance License (required).
- Candidate will have commercial insurance knowledge, technology proficiency, clear written and verbal communication skills.
- Professional Designations are a plus.
- Candidate will have good working knowledge of technology and embrace new tools.
- Strong time management skills. Able to manage multiple service needs at the same time.

POSITION FUNCTIONS (aka The Details)

- Ability to provide meaningful support in servicing existing clients and winning new business.
 - Working knowledge of carriers portals and online endorsement procedures.
 - Awareness of ancillary tools such as IRMI, Producer Plus, NCCI, etc.
 - Leverages supportive technology such as Reference Connect, TransactNOW.
- Follows *agency procedures manual* using agency management system to document and service clients.
- Make incidental inside sales. Examples include builders risk, increased limits, or adding coverage (for example: autos, locations, umbrella or EPL).
- Work to move clients to electronic delivery of policies, endorsements, certificates and other policy documents.
- Manage the renewal process in a timely fashion.
- Timely follows up on outstanding claims, applications, and underwriting data.

GENERAL TERMS

This job description is intended to describe the level of work required of the person performing the job. This description is not intended as a contract and is subject to unilateral change and revision by management. Any written contractual agreements will supersede this job description. All requirements may be modified to reasonably accommodate physically or mentally challenged employees. Winters-Oliver Insurance Agency is an equal opportunity employer.

www.wintersoliver.com