

GOLSAN SCRUGGS

FINANCIAL INSTITUTION ACCOUNT MANAGER

Reports To: Senior RIA Account Manager
Supervises: None

General Job Description: Managing of client insurance files for financial institution firms.

Essential Functions:

- Manage financial institution client insurance accounts
 - Telephone and email correspondence with customers and fulfillment of their needs.
 - Invoice and collect account current invoices.
 - Activity all interactions and documents with clients.
 - Tracking current/future tasks.
- Complete turn-key processing of renewals from initial 90-day to binding.
 - Send 90-day email with follow-up and retrieval of updated information.
 - Communicate with underwriters and retrieve quotations; compare to expiring; confirm coverage accuracy; notify companies to bind; send binder/policies to client (with invoices if required).
 - Complete current and renewal certificates.
- Company requests
 - Communicate with client regarding any underwriting requests.
 - Discuss with Producer to determine strategy; discuss and submit recommendations to client.
 - Assist Senior RIA Account Executive and Producers with delegated tasks.
- General tasks
 - Answer telephone.
 - Complete faxes/emails.
 - File paperwork to respective client files.
 - Complete mailing of various items.
 - Communicate with supervisors and peers.
 - Establish and maintain interpersonal relationships.

Supervisory Responsibilities: None

Supervision:

Receive guidance with respect to general objectives; in most tasks and projects assigned determine methods, work sequence, scheduling, and how to achieve objectives of assignments; operate within specific policy guidelines.

Other Duties and Responsibilities:

- Comply with all employment policies, practices and procedures.
- Participate in proactive team efforts to achieve departmental and company goals.
- Perform other duties as assigned.
- Provide leadership to others through example and sharing of knowledge/skill.

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Knowledge Requirements:

- Knowledge of administrative and clerical procedures and systems such as word processing, managing files and records, and other office procedures and terminology.
- Knowledge of principles and processes for providing customer and personal services. This includes customer needs assessment, meeting quality standards for services, and evaluation of customer satisfaction.
- Knowledge of the structure and content of the English language including the meaning and spelling of words, rules of composition, and grammar.

Experience:

Customer service experience.

Certificates, Licenses, Registrations:

None.

Language Skills:

Ability to read, analyze and interpret general business documents, customer data, insurance policies, etc. Ability to write information and respond to questions from supervisors, clients, customers, and the general public.

Mathematical Skills:

Ability to add, subtract multiply and divide in all units of measure, using whole numbers, common fractions, and decimals. Ability to compute rate, ratio, and percent. Ability to calculate figures and amounts such as discounts, interest, commissions, proportions, percentages, and area.

Reasoning Ability:

Ability to solve practical problems and deal with a variety of concrete variables in situations where only limited standardization exists. Ability to interpret a variety of instructions furnished in written, oral diagram, or schedule form.

Computer Operations:

Proficient personal computer skills including electronic mail, record-keeping, routine database activity, word processing, spreadsheet, graphics, etc.

Planning/Organization:

Handle multiple projects simultaneously.

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Physical Environmental Demands: see below on-the-job time spent in the following activities.....

	<u>Amount of Time</u>
Stand:	Under 1/3
Walk:	Under 1/3
Sit:	Over 2/3
Use hands to finger, handle or feel:	Over 2/3
Reach with hands and arms:	Under 1/3
Climb or balance:	Under 1/3
Stoop, kneel, crouch or crawl:	Under 1/3
Talk or hear:	Over 2/3

Weight lifted or force exerted:

	<u>Amount of Time</u>
Up to 10 pounds:	Over 2/3
Up to 25 pounds:	Under 1/3
Up to 50 pounds:	Under 1/3

Working Conditions:

Well-lighted, heated and/or air-conditioned indoor office setting with adequate ventilation.

Physical Activity Level:

Sedentary physical activity performing non-strenuous daily activities of an administrative nature.

Manual Dexterity:

Manual dexterity sufficient to reach/handle items and work with the fingers.

Vision:

No special vision requirements.

Work Schedule/Hours:

Monday through Friday, 8:00am to 5:00pm

Travel:

No special travel requirements.