



Account Manager Position Details

Employment Status:	Full-Time, Hourly	Location:	San Bernardino, CA
Department:	Customer Service	Pay Range:	\$41,600-\$60,000
Position:	Account Manager	Schedule:	8:00 am-5:00 pm Monday-Friday
Insurance License Required?	Yes	Travel?	Occasional
Benefits Package:	Medical, Dental, Vision, Life Insurance		

Position Summary

The account manager is primarily focused on providing excellent customer service and maintaining relationships with clients and prospects to retain existing business and win new clients. In support of this, the incumbent will also be required to continually grow and learn as it pertains to Insurance and their client industries.

Duties

Include, but are not limited to:

- Answer phones as needed
- Check and respond to e-mails daily
- Form and maintain professional relationships with new and existing clients
- Gather submissions from clients and prospective clients for new and renewal business
- Submit applications to obtain quotes from carriers and wholesalers
- Review carrier quotes for accuracy and pricing
- Create proposals for clients and prospects
- Present proposals to clients and prospects
- Collect bind items and payment from clients in timely manner
- Submit bind orders to carriers/wholesalers
- Issue Binders and certificates of insurance for clients
- Intake and process service requests for clients
- Review policies for accuracy
- Send policies to clients
- Collect premiums due to JS Platinum from clients
- Assist accounting department as it pertains to client accounts
- Maintain relationships with wholesale and carrier partners
- Generate and provide reports to management as it pertains to clients
- Setup and maintain current and past client and prospect files in CRM system
- Delegate work to assistant(s) and oversee progress
- Maintain appropriate insurance licensing and credentials at all times
- Collaborate with management to increase industry skills and knowledge
- Maintain a clean and organized workspace

and all other duties as assigned.

Please send a copy of your Resumé to: chris@jsplatinum.com