

## **Personal Lines Account Manager**

LBW Insurance & Financial Services, Inc. is looking for an experienced Account Manager for our Personal Lines Department.

LBW is the largest family owned, independent full-service Insurance Agency in the Santa Clarita Valley area. We are a boutique agency that provides very high quality, high touch levels of service to our clients and we are looking for the right person to join our terrific team.

### **Primary Functions:**

- Personal Lines Account Managers work in conjunction with an Account Executive to maintain and grow a book of personal accounts.
- Provide excellent client service at all times in accordance with LBW philosophy.
- Responsible for managing, evaluating, placing, and servicing of both new and renewal accounts.
- Must possess the knowledge and ability to act independently in all phases of the personal account management process.

### **Essential Duties & Responsibilities:**

- Update and change information in AMS from carrier downloads.
- Provide outstanding service, including client visits when necessary.
- Consistently provide the customer with prompt, knowledgeable and timely response to calls or inquiries.
- Document all calls, activities, and transactions in AMS360
- Identify, obtain, and analyze all information necessary to evaluate risk exposures and determine the appropriate coverages.
- Bind coverage; order binders/policies.
- Invoice agency bill/direct items and follow up for collection as needed.
- Check/Process policies and endorsements.
- Process incoming emails and mail
- Issue cancellation letters (for non-pay client bill policies) to the insured.
- Upload/Scan HO's renewal dec's – update policy info into AMS
- Quote new and renewing policies on carrier websites and/or PL Rater
- Issue renewal letters for all direct bill auto and direct bill homeowner policies
- Upload/Scan California Fair Plan renewal offers & issue renewal letters.
- Check payment status for non-payment cancellations with insurance companies.
- Issue identification cards for clients
- Assist in training new personnel.
- Other miscellaneous duties as assigned.

### **Qualifications:**

- Must hold a current and in good standing California Insurance Property & Casualty License

- Ability to communicate effectively, both verbally and written
- Detail oriented and accurate
- Very Proficient in Word/Excel/Outlook
- Advanced knowledge in Agency Management Systems (AMS360 a Plus)
- Minimum 4 years of experience in Personal Lines Insurance
- Dependable, well organized and ability to multi-task
- Demonstrate sound judgment, outstanding decision making, problem solving, and analytical skills
- Able to work in a fast-paced production environment
- Team Oriented
- Reliable attendance

**Salary:**

\$55,000.00 - \$72,000.00 per year

We offer a great working environment, competitive salaries, 100% Medical and Dental Benefits paid by LBW for the Employee, 401K plan with Match, and other excellent Benefits.

Normal work hours are 8:30 am to 5:00 pm Monday - Friday with a 1-hour lunch.

Fully onsite or hybrid schedule available.

**Benefits:**

- 401(k)
- 401(k) matching
- Dental insurance
- Health insurance
- Vision insurance
- Paid time off

**To apply:**

Send resume to Sandra Phillips at [SandraP@LBWinsurance.com](mailto:SandraP@LBWinsurance.com)