



## **Personal Lines Account Manager**

At Dyste Williams, we strive to be a trusted insurance advisor and advocate for our clients. Our experienced professionals are trusted to handle all insurance needs. Many of our seasoned insurance experts have more than 20 years of experience. We're passionate about keeping up with the latest insurance products and benefits and participate in continuing education. Dyste Williams employees adhere to the highest level of integrity which has been recognized throughout the community and the insurance industry. At Dyste Williams you are part of a successful and supportive team that seeks to meet our client's needs. This position will also be responsible for servicing individual life and health clients.

### **Position Overview**

The Personal Lines Account Manager is accountable for delivering high quality and efficient service to both internal and external clients by assisting with the Agency's overall workflow processes. At Dyste Williams you are part of a successful and supportive team that strives to exceed our client's expectations about their insurance. As an Account Manager in the Personal Lines Department, you fulfill a critical role for your clients by helping to protect their personal assets and future. At Dyste Williams you will work both independently and closely with a small team to manage your clients' insurance program, help them understand and identify their exposures and make recommendations. This position will work on property & casualty and life & health accounts.

### **Primary Responsibilities Include:**

- Provides high quality customer service while assisting in the coordination of services between the client and the insurance company
- Develop and maintain strong relationships with the client
- Promptly responds to routine requests for data and questions from clients, underwriters and internal staff
- Quoting and remarketing accounts
- Responsible for new client setup and ongoing maintenance of client file in chosen Agency Management System
- Ensures policies follow coverages as quoted, proposed and bound
- Provides clerical support in all aspects of client care. This includes such activities as reviewing binders, policies and endorsement for accuracy, maintaining files and creating documents such as proposals and binders
- Schedule and participate in client meetings as necessary
- Develop and maintain positive and effective relationships with our insurance carrier partners
- Refer business across all departments (i.e., commercial lines and employee benefits)

### **Job Specific & Technical Skills & Competencies:**

- Active Property & Casualty and Life & Health Insurance license
- Proficient in basic computing skills including Microsoft Office Suite
- Professionalism – Approaches others in a tactful manner; reacts well under pressure; treats others with respect and consideration regardless of their status or position; accepts responsibility for own actions; follows through on commitments
- Quality – Demonstrates accuracy and thoroughness; looks for ways to improve and promote quality; applies feedback to improve performance; monitors own work to ensure quality
- Ability to meet deadlines and coordinate complex tasks related to client interactions and policy management
- Experience with working with individual life and health accounts
- College degree preferred but not required