



## **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.

We are currently working in a hybrid model. This position will work in the office on Wednesday and Thursday, remote on Monday, Tuesday and Friday. This is subject to change and may require additional days in the office.

### **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.

### **Primary Responsibilities Include:**

- Demonstrate prompt client service that solves client issues effectively
- Promptly responds to routine requests for data and questions from clients, underwriters and internal staff
- Proactively assess the clients insurance, reviewing policies for accuracy and identify gaps for additional or alternate coverage based on client needs
- Analyzes, prioritizes and interprets information drawing accurate conclusions with minimal guidelines
- Quoting and remarketing accounts
- Proficiently maintain agency management system data for accuracy
- Provide 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, binders/proofs and insurance summaries
- Schedule and participate in client meetings as necessary
- 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 individual life and health accounts
- College degree preferred but not required