



Delivering Peace, Empowering your Potential, and Fortifying the Future.

### **Commercial Lines Account Manager (AM)**

**Reports To:** Niche Team Manager

**Employment Status:** Non-Exempt

**Objective:** Effectively verify the accuracy of policies and endorsements for commercial accounts. Systematically process received client information to ensure the continuous upkeep of accurate and current client files. Collaborate closely with the Account Executive to provide steadfast support in the servicing of client accounts.

#### **Performance Expectations/Responsibilities**

- Review and process new and renewal policies promptly within a 10-day timeframe of receiving the policy, ensuring a thorough review with the Account Executive before sending it to the client.
- Request, review, and process endorsements to and from various carriers. Enter change requests into EPIC and ensure correction of all incorrect endorsements.
- Follow up with carriers for change requests not processed by the designated follow-up date.
- Issue certificates, auto ID cards, and verify their accuracy; forward them to clients with appropriate correspondence under the guidance of the Account Executive.
- Receive and process daily mail accurately and timely, updating EPIC and following official agency workflows. Daily mail includes all company correspondence, including policies and endorsements.
- Demonstrate teamwork by collaborating with Account Executives and other agency employees.
- Attend Commercial Lines meetings, training, and classes as requested by management or required for maintaining the appropriate state licensing and designations.
- Prepare and send insured letters associated with processed documents.
- Perform additional functions as assigned by management.

#### **Required Skills**

- Strong organizational and time management skills, demonstrating the ability to prioritize tasks effectively.
- Commitment to seeing work projects through to completion.
- Self-motivated individual with keen attention to detail.
- Capable of working collaboratively in a team environment as well as independently.
- Self-directed and proactive in approach.
- Possesses strong reasoning skills.

- Pays meticulous attention to detail and accuracy.
- Ability to analyze and interpret complex and abstract situations.
- Effective communication skills, both verbal and written, in a clear and concise manner.
- Upholds honesty, integrity, professionalism, and respect.

### **Education/Training Requirements**

- Prior insurance experience is desirable.
- Proficiency in utilizing a desktop or laptop computer, calculator, agency management system, and all Microsoft products, including but not limited to Word, Excel, and Outlook, is essential.
- Must maintain an insurance license as mandated by the Colorado State Department of Insurance and Mountain West Insurance & Financial Services, LLC

### **Work Environment/Physical Demands**

- Extended periods of sitting at a desk while using a computer and other office equipment.
- Repetitive motion tasks, such as typing, data entry, and phone use.
- Occasional lifting of files or other materials, typically weighing up to 20 pounds.
- Ability to move freely around the office space to collaborate with colleagues or access office resources.
- Visual acuity to read documents, screens, and fine print on documents.
- Manual dexterity to operate office equipment and handle paperwork efficiently.
- Ability to maintain focus and attention to detail in a sometimes fast paced and multitasking environment.
- The office environment typically has a moderate noise level consistent with a professional office setting.
- Some travel may be required for this position, primarily for attending training sessions, conferences, or meetings with clients or stakeholders. A valid driver's license and reliable transportation may be necessary for travel to off-site locations.

**Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. Please note that this job description is subject to change at any time and does not encompass all responsibilities, duties, or activities that may be required of the employee. Additional tasks, responsibilities, and duties may be assigned as deemed necessary by management.**

**I acknowledge that I have read and understand the above job description in its entirety, and I can perform all the stated requirements.**

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**Employee Signature**

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**Date**