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Job Description Original: 02.05.18

**Review Form #2**

**Assistant Account Manager**

**Reports To: Vice President of WRC Agency**

**Non Exempt Position (subject to overtime)**

**EDUCATIONAL REQUIREMENTS:**

High school diploma

Strong verbal and written skills

Licensed in Property & Casualty Insurance

**LIFTING REQUIREMENTS:** None

**PRIMARY DUTIES:**

Run daily reports and process in TAM

Process all personal lines renewals, endorsements, cancels, rescissions, and new business in TAM

Forward policy documentation to agents

Follow up on underwriting requests

Receive, research, and answer customer and agent inquiries and requests regarding accounts, products, rates, and services offered

Document all activities in TAM and make sure that open activities are reviewed and acted upon in a timely manner

Follow up on proposals not sold, and policies that have not renewed.

Enter in all claims information as received from carriers into TAM

Review Monthly Expiration report and process in TAM

Remain current on changes in underwriting rules, procedures, policies, and products offered

Provide excellent phone and direct contract service to clients, agents, and prospects

Provide back-up assistance to the Front Desk as needed

**SECONDARY DUTIES**:

Quote, service, and sell new and existing personal lines business

Create and update Quote forms and other pre-fill forms as needed

Other duties as assigned by the Vice President of WRC Agency