

Account Manager | Surety

Date: June 1, 2016

Position Description

Job Purpose

To assist customers in identifying and providing for their bond needs; working directly with the client, Risk Consultant, Account Executive and carrier representatives in handling the execution and billing of bonds for our clients.

Organizational Relationships

Reports to the Surety Department Manager

FLSA Status

Non-Exempt

Essential Functions and Responsibilities

The Account Manager plays an integral part in the regular service needs of our Surety Clients. They are responsible for establishing and maintaining client and carrier relationships in servicing the bond needs of our customers.

1. Interacts with clients in responding to their bond specific needs, i.e., contract documents, bond forms, rating and billing questions, etc.
2. Interacts with surety company representatives in handling transactional related information/issues in the administration of the bond programs of our clients, i.e., premium billings, rating issues, contract documents, bond forms, bid results, etc.
3. Prepares client-specific documents
4. Processes billing transactions
5. Works within the agency management system's electronic file management specific to our surety clients, i.e., InsureVision and Applied
6. Coordinates client service with Account Executive
7. Continues to pursue professional development as applicable

Job Specifications

Competencies

1. High School Diploma
2. 3-5 years surety experience; brokerage experience is a plus
3. Insurance license for the states of Missouri and Kansas and other non-resident licenses as required or ability to immediately obtain them
4. Strong oral and written communication skills
5. Ability to understand and apply arithmetic concepts
6. Computer proficiency –comfortable and effective working within a paperless environment

7. Working knowledge of Microsoft products (Outlook, Word, Excel, etc.)
8. Strong organizational skills
9. Ability to perform successfully in a fast-paced, deadline-driven environment
10. Strong commitment to customer service

Supervisory Responsibility

This position has no direct supervisory responsibilities however it may act as a team leader for special projects.

Work Environment

This job operates in a clerical office setting. This role routinely uses standard office equipment such as computers, phones, photocopiers, filing cabinets and fax machines.

Physical Demands

This is largely a sedentary role; however, some filing is required. This would require the ability to lift files, open filing cabinets and bend or stand as necessary.

Position Type/Expected Hours of Work

This is a full-time position. The organization has flexible start times. Standard Non-Exempt employees work 7.5 hours, Monday through Friday. Evening and weekend work may be required as job duties demand.

Travel

This position may require some local travel.

Other Duties

Please note this job description is not designed to cover or contain a comprehensive listing of all activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities and activities may change at any time with or without notice.

Physical requirements of the position are subject to modification to reasonably accommodate individuals with disabilities. Thomas McGee is an Equal Opportunity Employer.

To Apply

Please send your resume to Ann Van Buskirk: avanbuskirk@thomasmcgee.com.