

# **Cresco Insurance Agency**

## **Administrative Assistant & Account Manager**

### **Position Summary**

Services agency customers and prospects via phone and in person. This position also requires the individual to process customer insurance documents and lend support to Agency Producers to increase agency retention and revenue

### **Responsibilities**

Greets customers in person and by phone in a positive and professional manner and directs to appropriate personnel.

Accept and process payments for customers including answering questions and making bank deposits.

Scan documents to customer accounts and process incoming and outgoing mail, emails, and faxes.

Assist producers in marketing current and prospective customers.

Works with customers and/or Producers to ensure adequate coverage, answer policy questions, resolve problems, accept policy changes, etc.

Prepare and review various documents such as renewals, claims, new applications, change requests, underwriting requests, etc.

Re-quote current policies at Producers request and presents proposals and recommend coverage based on customer needs and agency minimum standards for limits.

Assist in gathering claim information.

Maintains working knowledge of carrier interface systems and rate manuals and maintains relationship with company underwriters.

Follows agency policies and procedures regarding document workflow and works in a manner to prevent errors and omission.

Attends carrier provided product seminars, maintains insurance license(s) with continuing education, and keeps current with changes in the market place.

### **Requirements**

1. High school diploma or general education degree (GED); one to two years experience in an insurance agency; or three to four years of related experience combination of education and experience.
2. Ability to read and comprehend simple instructions, short correspondence and memos.
3. Ability to effectively present information in one-on-one and small group situations to customers, clients and other employees of the organization.
4. Must be able to operate a multi-line telephone, copy and fax machine.

5. Experience with Outlook, Excel, WORD and MS Office software programs.
6. Must be able to use the agency management software, TAM, in order to satisfy the positions job requirements.
7. Maintain a current license in specific insurance discipline(s).
8. Position requires the ability to work before or after normal business hours to attend various employee meetings and training sessions.

### **Benefits**

We offer a competitive salary and comprehensive benefits program, including medical, prescription drug, dental, vision, 401k with company match, life insurance, paid time off, and profit sharing.

**Cresco Insurance Agency is an Equal Opportunity Employer of women, minorities, protected veterans and individuals with disabilities. All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, or national origin.**