



PERSONAL LINES ACCOUNT MANAGER – Job Description

The Corcoran & Havlin Insurance Group, a division of Cross Insurance, is looking for an experienced Account Manager to join our talented Personal Lines team in our Wellesley, MA headquarters. The selected employee will service assigned Personal Lines insurance accounts.

Work from home options available.

Specific responsibilities include:

- Build trusting relationships with both current and new clients.
- Analyze, evaluate and discuss client risks to determine appropriate coverages.
- Handle all inquiries from assigned clients regarding their existing policies and any new P&C insurance needs and requirements.
- Maintain activities/suspenses in EPIC to follow up on outstanding orders, correspondence and overdue items.
- Keep EPIC accurate by reflecting all current policies, limits, and coverage. Scan policy documents and log activity into EPIC.
- Review renewals and provide coverage suggestions or remarket if necessary as requested by insureds producers or manager.
- Keep informed of changes and trends within the industry for the purpose of anticipating and responding to customer and insurance company needs.
- Conduct business in a professional manner in both internal and external communications and with the agency E&O guidelines.
- Other responsibilities and activities as assigned by management.

Qualifications:

- Property and Casualty License
- 3+ years of Agency experience
- Strong organization, interpersonal, written and verbal communication skills
- Ability to problem solve and prioritize work
- Comfortable with technology and with Microsoft products
- Work autonomously and in a team environment
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Benefits:

- Salary + annual bonus
- Paid vacation and sick time
- 401K
- Short and long-term disability
- Flexible spending account
- Paid continuing education and training
- 100% employer paid health and dental insurance for individuals

Please send your resume to **Jennifer Wheeler** at JWheeler@chinsurance.com