



LIGHTHOUSE POINT, FLORIDA

COMMERCIAL LINES ACCOUNT MANAGER

Bateman, Gordon & Sands, Inc. is an independent insurance agency founded in 1947 committed to helping our clients solve all insurance and risk issues and opportunities with our clients. We assess the business and personal insurance challenges of our clients with a team of qualified and experienced professionals to bring the right solutions for our clients.

We are committed to building long-term relationships with our clients and employees. We believe in working as a team supporting and mentoring each other in a positive, collaborative environment. We have a passion for helping individuals and businesses manage everyday risk, recover from unexpected life events and realize their dreams. Our employees work directly with the owner.

If you are detail oriented, organized, have solid verbal and written communications skills and believe that exceptional behavior creates exceptional results, then you have the tools that we are looking for to be a Bateman, Gordon & Sands team member.

We seek a Commercial Lines Account Manager to obtain and retain the ideal Bateman, Gordon & Sands client. This is a salaried, full-time position with benefits.

SCOPE AND RESPONSIBILITIES

- Coordinate expirations with producer to obtain renewal and/or new business information. Maintain expiration control log
- Provide oversight to our tech support personnel who perform all clerical duties related to coverage including processing of endorsements; checking policies and endorsements for agreement with initial application or request; invoicing agency bill renewals, endorsements and policies
- Maintain various suspense systems and conduct follow-up when appropriate
- Market new and/or renewal business, determine premiums, prepare presentation packets and maintain underwriting and marketing information by carrier
- Check new and renewal policies for accuracy in rating, typing, coverages, signatures and input these transactions to generate billing invoices. Ensure that these items are delivered and/or mailed to the client
- Manage phone calls from clients and companies regarding insurance, claims, or administrative issues and comply with the request and/or refer to the producer only when necessary
- Maintain a suspense system to follow-up on outstanding orders, correspondence, reports and follow-up on overdue and suspense items
- Maintain all client activity in the agency automation system. Maintain files in an orderly, up-to-date manner.
- Be familiar with and follow agency E&O guidelines
- Upon receipt of claim/loss, responsible for completing claim file, which includes policy verification, making preliminary or tentative determinations of coverage for the purpose of payment and permanent record keeping
- Foster and seek relationships with teammates across all departments of Bateman, Gordon & Sands
- Attend training sessions, courses, to maintain up-to-date knowledge and skills
- Maintain strict client confidentiality

EXPERIENCE/SKILLS REQUIRED

- High school diploma or equivalent
- 3-5 years' experience as a Commercial Lines Account Manager in the Florida market
- 2-20 License
- Proficiency in Microsoft Office 365
- Ability to read, write and speak in English
- Exceptional written and verbal communication skills
- Sagitta experience beneficial

ATTRIBUTES/CAPABILITIES/DESCRIPTORS

- Excellent people management and relationship skills. Ability to foster a cohesive, collaborative team
- Business skills in client management, business development
- Ability to manage multiple projects simultaneously
- Leadership skills in mentoring less experienced personnel, motivating staff, and working in a team-based environment
- Knowledge and relationships within the Florida insurance market
- Skills in delegation and time management

REWARDS/BENEFITS/COMPENATION

- Competitive Salary based on experience
- Opportunity for advancement and growth in the position
- Generous benefits package including health, dental, vision and short-term disability with a generous company contribution toward health insurance
- Flexible Spending Account for healthcare
- Company paid life insurance
- Company paid LTD/AD&D insurance
- 7 paid holidays annually
- 14 days paid time off annually with increases based on length of employment
- Staff events, lunches, happy hours provided by the company
- Company paid \$500 annual allowance for CE compliance or designations

TO APPLY:

Please email your resume and cover letter with "Personal Lines Account Manager" in the subject line to cbarnes@bgsagency.com. Qualified resumes with cover letter will receive notification of receipt.

Equal Opportunity Employer

BATEMAN, GORDON & SANDS, INC. maintains a strong policy of Equal Employment Opportunity (EEO) for all Employees and applicants for employment. It has been and will continue to be the policy of BATEMAN, GORDON & SANDS, INC. to be fair and impartial in all of its dealings with its Employees and applicants for employment and to base all employment-related decisions upon valid job-related factors, without regard for race, color, religion, sex, sexual orientation, national origin, age, marital status, disability or citizenship, as well as of the classifications protected by applicable state or local laws. Our Equal Employment Opportunity philosophy applies to all aspects of employment with BATEMAN, GORDON & SANDS, INC. including recruiting, hiring, training, transfer, promotion, job benefits, pay, dismissal and educational assistance.