



AEBLY & ASSOCIATES

Insurance • Investments • TPA Services • Captives

Personal Lines Account Executive Position

We are seeking a Personal Lines Account Executive to join our team! You will be responsible for marketing new accounts to insurers, processing renewals and endorsements, handle client claims and other typical personal lines account servicing.

Responsibilities:

- Working in a team environment with the goal of growing our business profitably
- Cross-selling and account rounding whenever possible along with asking for referrals
- Utilizing our state-of-the-art technology and systems to educate, communicate and engage clients year-round
- Familiarize yourself with our other business units and products/services offered by the agency for cross-sell opportunities
- Become proficient in our Agency Management System and other personal lines related systems
- Meet with carrier reps and maintain a working knowledge of their target markets and product offerings
- Reviewing clients and prospects' existing coverage's; identifying gaps/weaknesses in coverage and offering solutions
- Inputting submissions on carrier websites
- Ensuring new business quotes/submissions, renewals and endorsements are complete and processed in a timely manner
- Engage with underwriters, as needed, on new business and/or renewal issues
- Document and update customer records based on interactions
- Develop and maintain a knowledge base of the evolving products and services
- Manage and protect the reputation of the agency and our carriers
- Handle all claims in a timely and professional manner

Qualifications:

- Minimum of 3 years previous experience in a personal lines account executive position
- Hold an active NYS Brokers License for, at least, Personal Lines (Property & Casualty preferred)
- Ability to build a rapport with clients and prospects
- Ability to prioritize and multitask
- Positive and professional demeanor
- Excellent written and verbal communication skills
- Must feel comfortable working with Microsoft Office products; primarily Word, Excel and Outlook
- Prior experience with AMS 360 is a plus



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Well established, growing firm with a fun team environment, great benefits and room for personal and professional growth.