**Commercial Lines Assistant**

We are a successful General Insurance Agency and Wholesale Broker looking for a dedicated Commercial Lines Assistant to join our organization. This position assists Underwriters and Brokers with miscellaneous tasks including rating; binding; requesting information; issuing Certificate of Insurance; reviewing applications, inspections, and other file documentation; building relationships; etc. In this position there is a great deal of email, phone, and overall computer work.

**Duties (including but not limited to):**

* Effectively communicate information to both internal and external customers and ensure that standards of excellence are maintained.
* Assist in developing, enhancing, and maintaining standards and processes and procedures as required.
* Participate in ongoing training and educational opportunities.
* Assist in the training of other assistants as required.
* Maintain a book of assigned renewals or carriers, and retain existing accounts that meet underwriting guidelines or carrier guidelines.
* Market accounts with the underwriter/broker’s approval.
* Maintain electronic files in accordance with the company’s guidelines.
* Refer renewal files to underwriter/broker along with a summary and recommended course of action for accounts falling outside of underwriting authority and/or carrier guidelines.
* Follow carrier issuance instructions for renewal policies, endorsements, and notices of cancellation, non-renewal and offers to renew on those transactions that are handled in-house.
* Process endorsements, both money and non-money, including additional insured requests.
* Request & process binders in-house or carrier-issued binders, and follow up on outstanding subjectivities until the policy is issued. Ensure that the risk is in the system correctly and completely.
* Issue policies and endorsements for any companies that the department issues in-house.
* Review policies to confirm they are issued accurately and in compliance with underwriting guidelines, or policies issued by carrier are correct and address discrepancies as needed.
* Process loss runs requests. Confirm need, and work with agent to see if insured is shopping and try to hold on to renewals as needed.
* Review and process audits.
* Review and evaluate inspections within established guidelines to ensure accuracy of premium basis exposures. Correspond with agents regarding inspectors’ recommendations as necessary.
* Prepare statements of values as needed.
* Maintain familiarity with surplus lines tax calculations and state filing requirements.
* Answer phone calls regarding all aspects of business. Document all conversations and delegate or follow up on work for each inquiry. Assist these customers to correct departments.
* Maintain confidentiality with discretion and integrity with both internal and external information.
* Process/issue certificates. Advise agents on fees for additional insureds and special wording.
* Assist with routing when needed.
* Perform other duties as assigned.

**Qualifications:**

* Prior insurance industry experience of 1-3 years or the equivalent
* Effective verbal and written communication skills
* Ability to work independently in a fast paced environment
* Ability to work in a team environment and have an exceptional work ethic
* Must be extremely detail-oriented and possess critical thinking skills
* Computer skills, including proficiency in Microsoft Office
* Basic math knowledge, ability to compute rates, ratios, and percentages
* Ability to prioritize tasks and ensure that deadlines are met in connection with department goals
* Proficiency in insurance terminology and the ability to review coverage forms

This position is Full time, Monday-Friday, 40 hours per week.

The above is a “summary” of qualifications but additional job duties and qualifications may be required.

At Chris-Leef General Agency, Inc, we foster an environment of accountability, teamwork and integrity.  Our motivated employees have built an impeccable reputation for our firm serving the Excess and Surplus Lines industry. We offer a comprehensive benefits package which includes medical insurance, dental, life/AD&D, long-term disability, short-term disability, vision, accident, cancer and a 401(k)/Profit Sharing plan.

Qualified candidates should submit their resumes along with salary requirements. Salary is open and negotiable based upon experience.

If you are interested or know someone who might be interested please submit a cover memo and resume to cpeterson@chris-leef.com.