CREATIVE PLANNING

Title: Personal Lines Risk Manager (Property & Casualty)

Location: Central/West Coast - FL

Job Description: **JOB SUMMARY**

The Risk Manager is responsible for providing a comprehensive insurance approach to the personal insurance needs of clients based on their specific exposures. They will provide quotes, explain coverages, and make recommendations to protect client assets.

We do not accept resume submissions from third-party recruiters or staffing agencies. Please contact our recruiting team directly.

JOB DUTIES

- Use existing relationships to assist in securing additional carrier contracts with regional FL insurance companies.
- Submits applications and claims history to obtain new business quotes from carriers and ensure timely receipt.
- Requests quotes from carriers as required and documents AMS on coverages.
- Reviews quotes and resolves any discrepancies directly with the underwriter and communicates final quotes to clients.
- Work with Creative Planning Wealth Managers and Financial Planners to determine client coverage needs and communicate ongoing status.

REQUIRED EXPERIENCE / QUALIFICATIONS

- Minimum of 5 years insurance experience
- Property & Casualty Insurance Agents License in Florida
- Knowledge of Personal Insurance Products and usages
- Knowledge of Insurance rating and underwriting procedures
- Proficiency in AMS360 and/or MS Word, Excel and PowerPoint

PREFERRED EXPERIENCE / QUALIFICATIONS

- An ongoing effort to obtain professional designations such as CISR, CIC.