



## CREATIVE PLANNING

Title: Commercial Lines Account Executive (P&C Insurance)

Location: Overland Park, KS

Job Description: **JOB SUMMARY**

The **Commercial Lines Account Executive** oversees the daily operations of complex and key customer accounts, as well as middle market accounts. Their primary goal is to foster long-term client relationships and capitalize on sales opportunities within these accounts. They deliver prompt, precise, and courteous service to agency clients, proactively addressing and resolving any issues or concerns.

The Account Executive supports Producers in re-marketing existing accounts by preparing timely and accurate renewal proposals, among other responsibilities. Additionally, they collaborate with company representatives to obtain renewal quotes from the incumbent carrier for presentation to the insured or Producer. With extensive expertise, the Account Executive also provides leadership by assisting team members with intricate insurance inquiries and challenges.

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

**JOB DUTIES:**

- Handles phone calls from clients and carriers regarding insurance coverage, claims, or administrative issues, complies with requests or refers them to the Producer, while documenting the system per agency procedures.
- Update applications and renewal information as needed to reflect changes during the policy year.
- Request endorsements from carriers through AMS to document changes to coverages and exposures throughout the policy term.
- Resolve discrepancies in endorsements or policies received from the company.
- Submit applications, loss runs, etc., to incumbent carriers and alternative markets for renewal quotes then following up to ensure timely receipt.

- Review quotes to verify requested coverages match applications, resolve discrepancies with underwriters, and communicate final quote results to Producers.
- Prepare summaries of insurance, schedules, and proposals for Producers and customers as needed.
- Communicate *bind requests* per Producer instructions, confirm coverage with carriers, and issue binders.
- Issue Auto IDs for new business policies, renewals, and auto changes throughout the policy year.
- Create master certificates reflecting current coverages for new business policies, renewals, and as needed throughout the policy year.
- Invoice agency-billed policies, endorsements, and audits, and execute premium finance agreements as needed.
- Assist insureds with audit disputes by reviewing audit worksheets and providing guidance on resolution.
- Assist clients in submitting first reports of claims, facilitate prompt responses from carrier staff, and follow up on claim statuses per agency procedures.
- Work with Accounting to resolve discrepancies on agency-billed policies, collect outstanding premiums on past due invoices, and request cancellations from carriers as per agency procedures.
- Process cancellations as requested, determine reasons for cancellations, act to save accounts, follow up to ensure accurate, timely resolution, and minimize unpaid premiums.
- Complete other tasks as requested by Producers, such as premium breakdown summaries, claims narratives, Mod Master analysis, and producing reference materials from Broker Briefcase.

**REQUIRED EXPERIENCE/QUALIFICATIONS:**

- Minimum 5 years of insurance experience
- Bachelor's degree preferred
- Property and Casualty Insurance Agents License in Kansas or Missouri.
- At least one advanced designation, such as CIC, CPCU, ARM, etc.
- Extensive knowledge of commercial insurance products and their applications.
- Understanding of insurance rating and underwriting procedures.
- Strong oral and written communication skills to explain complex issues, interpret detailed information, and respond appropriately.

- Excellent listening skills and attention to detail.
- Strong desire to assist others with complex insurance issues.
- Ability to manage multiple tasks simultaneously and prioritize workload effectively.
- Capability to make independent decisions.
- Strong relationship-building skills with Producers, companies, customers, and co-workers.
- Team player with the ability to adapt to a fast-paced, changing work environment with a positive attitude.

**PREFERRED EXPERIENCE/QUALIFICATIONS:**

- Experience with Captive Programs
- Experience with Contract and License & Permit Surety Products
- Knowledge of AMS360

**TECHNICAL SKILLS:**

- Microsoft Office – specifically Excel, Word
- Ability to navigate the Internet