



CREATIVE PLANNING

Title: Personal Risk Manager Account Coordinator

Location: Overland Park, Kansas

Job Summary:

The **Account Coordinator** is responsible for providing support services to our Property & Casualty Risk Managers with various tasks as needed to provide excellent customer service to our clients.

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

Job Duties:

- Navigates to various companies and internet websites to research information, prepare build files, complete digital worksheets, process endorsements, prepare and send completed insurance applications to clients for signatures, attach documents to files as required.
- Calculate rates and push quotes through to carrier websites.
- Follows up on policy documents with carriers and clients to ensure timely processing.
- Assists Risk Managers when needed by performing various tasks such as web-based marketing, entering large collection schedules, running clue, motor vehicle records, and insurance scores, sending Account Manager Intro emails.
- Complete Location checks for properties in high-risk areas.
- Back up Risk Managers on their team when Risk Manager is on vacation.
- Update Salesforce Referrals

Required Experience/ Qualifications:

- Strong communication skills, both oral and written.
- Good listening skills and attention to detail are critical.
- Ability to manage multiple tasks concurrently and prioritize workload appropriately.
- Strong relationship-building skills with Risk Managers, companies, co-workers.
- Able to be a team player and adapt to a fast-moving, changing work environment with a positive attitude
- Ability to navigate company websites to obtain documents.
- Knowledge of agency management systems and Microsoft Office
- Send Generic recommendations when there is no opportunity.
- Willingness to take on new tasks as needed or processes change.

Preferred Experience/ Qualifications:

- Minimum of 3 years insurance experience.
- Property and Casualty Insurance Agents License in Kansas or Missouri.
- Knowledge of Personal Insurance terminology, products, and usage.

- Knowledge of AMS360
- Knowledge of Salesforce
- Knowledge of PL Rater

Technical Skills

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