

Property & Casualty Account Manager, Personal Lines

Ancora is seeking an Account Manager who will provide prompt, accurate and courteous service to our clients, producers and company personnel, while offering a high level of support in obtaining, maintaining, expanding and servicing our accounts.

Location

This is a hybrid position based out of Ancora's Westlake, Ohio, office.

Duties & Responsibilities

Client Support

- › May be first point of contact on some accounts; supports in delivering service to book of business.
- › Maintains accurate client information to provide day-to-day client support and address intermediate-level client inquiries.
- › Assists in the development of strong business relationships with appropriate insurance carrier personnel.

Account Management

- › Processes and oversees client claims. Working with adjusters and agency account team throughout the claim process.
- › Processes change requests/endorsements, binders, certificates of insurance, account summaries, proposals, policies, lost policy releases, audits and account balance status as needed.
- › Ensures accuracy of account information for both new and renewal policies, endorsements.

Insurance Knowledge

- › Proficient working knowledge of renewal processes.
- › Leverages technical knowledge to ensure carrier quotes are received in a timely fashion; Reviews quotes for gaps and assists with inquiries from the carrier.
- › Attend training and seek self-directed learning to continue education in industry and technical knowledge.

Qualifications

- › 2-5 years of work experience in personal lines insurance, preferred
- › Current property and casualty license, preferred
- › Strong working knowledge of Microsoft Office applications and general PC skills
- › High ethical standards and ability to maintain confidentiality while following organizational policies and procedures
- › Team-oriented with effective interpersonal communication skills and a desire to learn and help others
- › Highly organized and accountable with attention to detail and accuracy
- › Ability to multi-task with a strong work ethic
- › Professional appearance and demeanor

Benefits

Ancora offers a competitive salary and excellent benefit package with a culture of teamwork and recognition.

About Ancora

Ancora is a client-focused and growth-oriented investment and financial advisory firm based in Cleveland, Ohio. The Firm is recognized for providing investment advisory, money management, insurance and retirement plan advisory services to individuals and institutions. Ancora promotes a friendly, family-oriented work environment and encourages our employees to strive for personal and professional growth with the highest level of integrity.

Ancora is an Equal Opportunity Employer

All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, national origin, protected veteran status, disability, or any other basis protected by applicable law.

Visit www.ancora.net for more information.

Apply

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