

INSURANCE ACCOUNT SPECIALIST – Remote/Hybrid

ABOUT US: CalSurance Associates is a leading E&O insurance broker for Life & Health and Property & Casualty Insurance professionals. We provide insurance brokerage and program administration services to some of the largest insurance firms in the United States. As the originator of large group E&O programs for insurance agents, we have over fifty years of experience delivering customized insurance solutions to insurance agents, agencies, and organizations.

POSITION SUMMARY: The Account Specialist provides support to the team in servicing customers.

RESPONSIBILITIES:

- Invoicing of direct enrollment accounts.
- Preparing Reports, spreadsheets and conducting analysis on large accounts.
- Claim coverage verifications.
- Monthly premium reporting to the carriers.
- Work with accounting on resolution of certain account payment issues.
- Surplus lines filings and paperwork.
- Set up of client binders.
- Formats standard enrollment material.
- Premium finance agreements.
- Special projects as assigned by Operations Supervisor, Account Executives, Vice President, Marketing & Operations.
- Process endorsements generated by premium reporting.
- Monthly enrollment summaries to clients.
- Distribute copy of policy to Lancer and Client Services.
- Special Certificate handling and coordination.
- Help coordinate Team CSR Account activities as required.
- Help Coordinate IT projects for Operations Supervisor, Account Administrators and Managers.
- Other duties may be assigned.

REQUIREMENTS:

- Must have data analysis/management (MS Excel) experience.
 - AMS360 experience (preferred).
 - ImageRight (Paperless System) experience (preferred).
 - Good written and oral communication (required).
 - Highly organized and flexible self-starter comfortable working in a small team.
 - Ability to coordinate resources to resolve client and carrier (market) service issues.
 - Ability to review and explain insurance policy terms and conditions to clients and team members.
 - Proficiency with Microsoft Office – Excel, Word, PowerPoint and Outlook.
 - Ability to maintain a high level of confidentiality.
 - High School diploma/GED.
 - Must become a licensed Property & Casualty Insurance Agent within 90 days of hire* including passing the state of California's extensive background investigation and completing the mandatory hours of licensing education. If you currently have a P&C insurance license, you must keep your license in good standing by adhering to the continuing education hour requirements and background checks.
- *CalSurance Associates pays for required insurance licensing for our teammates.

Our Company offers full time teammates a benefit package that includes 401k plan, employee stock purchase plan, medical, dental, vision and other voluntary products. Our Company is an Equal Opportunity Employer. We take pride in the diversity of our team and seek diversity in our applicants.

CalSurance Associates is a subsidiary of Brown & Brown Inc., listed on the New York Stock Exchange, Brown & Brown (BRO).

Work hours for this position: M-F 8:00am-5:00pm (Pacific Time)