

Commercial Account Handler

Godalming

Summary;

Finch are looking for a Commercial Account Handler to join our highly enthusiastic and established team. This is a support role working within a team of technicians to support a broking team of Account Executives, to help deliver a comprehensive insurance service to existing and new customers.

This will involve placing cover when instructed, inviting and confirming renewals, dealing with mid-term adjustments, broking client requirements within the insurance market and providing assistance with claims issues when appropriate and collection of money when requested.

Responsibilities;

Processes:

- Manage a book of small ticket renewals, from issuing renewal proposals, seeking terms and inviting renewals.
- Control your own diary system, ensuring all items are followed up by the due dates, particularly in relation to outstanding documentation from clients or insurers, premium payments and continuation cover
- Assist, when required, with the Accounts function of the business in carrying out credit control with relevant customers. To be responsible for ensuring the collection of monies from clients within the Company's agreed credit period, whilst maintaining good relationships with those clients and with insurers
- Monitor spreadsheet and ensure contacts are made within service standard and renewals offered and bound.
- Check thoroughly all client documentation before despatch, ensuring queries are raised and amendments completed
- Filing of client paper files and allocation of electronic files on a regular basis

Staff:

- Any duties that may be required by your Line Manager in accordance with the nature of this job and liaison with claims and accounts colleagues.
- Being part of your broking team but also being considerate of other teams and their needs

Customer:

- Take instructions from new clients, ensuring cover commences at the correct time, all relevant paperwork is completed, premium is collected and relevant records and diary entries are created.
- Take instructions from existing customers in respect of alterations to current policies, ensuring insurers are notified and records updated.
- Offer renewal of existing clients' policies with current insurer or move to new insurer, as appropriate. In each case, ensure relevant paperwork is completed, premium is collected and relevant records and diary entries are created

Required Skills

KNOWLEDGE:

The job requires a thorough knowledge of:

Processes:

- FCA Regulations for dealing with Retail and Commercial Customers
- FCA regulations for dealing with Client Money, Treating Customers Fairly, Complaints regulations and Data Protection ACT
- The Company's Complaints Procedure
- The operation of the Company's IT system, including procedures, authority limits and audit trails, and in particular, the operations and functions related to transacting business via EDI
- Good working knowledge of Open Gi

Customer:

- The principles, practices and legalities of all major classes of General Insurance and in particular, insurable interest, utmost good faith, indemnity, contribution, average and subrogation
- The UK General Insurance market in respect of Commercial insurance
- Underwriting and rating factors, and how these are applied in relation to all major classes of Commercial insurance
- The range of Commercial Lines products offered by the Company and the handling procedures for each of them

The Role

Finch is a Top 50 Insurance Broker, with a history dating back to 1971, we are an Ethos Broking Partner. We have recently been shortlisted as 'Commercial Lines Broker of the Year' at the Insurance Times Awards.

This role is full time, based in our Godalming Branch.

Benefits

- Pension
- Death in service
- Bonus
- Competitive salary
- The successful candidate will also have the opportunity to work towards their CII qualifications

We invite all qualified candidates to apply. Please note you must be eligible to work in the UK to be considered for this role. We thank everyone for their interest however only successful applicants will be contacted.

To Apply please forward your CV and covering letter to Jobs@finchgroup.net

****NO AGENCIES OR PHONE CALLS PLEASE****