

CRISPIN SPEERS AND PARTNERS LIMITED

JOB DESCRIPTION

Job Title:	Account Handler (Travel and A&H predominantly)
Reports to:	A&H, Life & Specialty Manager
Business Unit:	A&H, Life & Specialty (Underwriting)

Job Purpose:	<p>Client facing support to provide quotes along with supporting technical, administrative and customer service support to develop, maintain and strengthen relationships.</p> <p>Involves using in-house agreements and bespoke Underwriting to provide solutions for renewal and new business accounts within the Accident & Health, Life and Special Risks Team.</p> <p>Working within a busy and expanding team who are growing their book of clients with Covid enabled products, which are attractive to the market and using new IT software to help improve efficiencies.</p>
Key tasks:	<ul style="list-style-type: none"> • Preparing and providing quotations for our supporting Brokers, Employee Benefit Consultants and Clients. • Liaison with Broking and Underwriting to secure bespoke solutions. • Administration of client's insurance requirements on a daily basis including general enquiries, renewals and mid-term adjustments. • Provision of technical, administrative and customer service support to Account Executives, Brokers and Producers. • Assess Clients needs and convert into presentations, quotations, orders and follow up. • Technical processing of risks, including preparation of slip/Underwriting presentations, documentation to Clients and premium processing. • Liaison with other internal Departments on various aspects of client management, including accounts and technical aspects of risk placement. • To keep fully up to date, and ensure compliance with FCA regulations. • Preparation and presentation of renewal statistics.
Skills and competencies:	<ul style="list-style-type: none"> • Well-developed written and verbal communication skills. • Demonstration and ability to deliver good customer service skills. • Strong administration, planning, organising and time management skills. • The ability to work alone, as well as working as part of a team. • The ability to assist in assessing Client needs and support to convert prospects into orders. • The ability to prepare and present renewals to maximise renewal

	<p>retention.</p> <ul style="list-style-type: none"> • High level computer skills and knowledge of Word, Excel and Outlook.
Knowledge and experience required:	<ul style="list-style-type: none"> • A pre-requisite is experience of Account Handling. • An understanding of a MRC Slip and Wording requirements. • Previous use of Insurance based software desirable. • FCA Compliance requirements. • Experience within a Travel Insurance team or a Lloyds broker and/or knowledge of the Lloyds market would be desirable.
Qualifications	<ul style="list-style-type: none"> • Desire to achieve CII qualifications.
Other	<ul style="list-style-type: none"> • Any other duties requested by senior management to fulfil the Job Purpose.