

**CRISPIN SPEERS AND PARTNERS LIMITED**

**JOB DESCRIPTION**

<b>Job Title:</b>	<b>Junior Account Handler</b>
<b>Reports to:</b>	<b>Manager – Corporate Accident &amp; Health Products</b>
<b>Business Unit:</b>	<b>Accident, Health Life &amp; Specialty Division</b>

Job Purpose:	<p>Crispin Speers and Partners Ltd (CSP) is a leading wholesale Lloyd’s insurance and reinsurance broker providing tailor-made solutions for UK and International clients.</p> <p>Working within a busy team, this role provides technical, administrative and client support to the Account Executive and Account Handlers whose roles are to develop, maintain and strengthen relationships with existing clients on renewal and new business in our key classes, A&amp;H Travel and Personal Accident insurances.</p> <p>The role will also include mentoring and monitoring the Client Support Assistants.</p>
Key tasks:	<ul style="list-style-type: none"> <li>• Preparing and providing quotations for our supporting Brokers, Employee Benefits Consultants and Clients.</li> <li>• Administration of client’s insurance requirements on a daily basis including general enquiries, renewals, and mid-term adjustments.</li> <li>• Provision of technical, administrative and customer service support to Account Executives, Brokers, and Producers.</li> <li>• Preparation of risk renewal data within timelines set out.</li> <li>• Preparation and management of membership data, including amending the data to be in a consistent format for processing.</li> <li>• Technical processing of risks, including preparation of slip/Underwriting presentations, documentations to Clients and premium processing.</li> <li>• Liaison with other internal Departments on various aspects of client management, including accounts and technical aspects of risk placement.</li> <li>• Attend virtual and in-person benefit fairs and webinars when required (this may involve travel within the UK/Ireland)</li> <li>• To keep fully up to date and ensure compliance with FCA regulations.</li> </ul>
Key Results Areas:	<ul style="list-style-type: none"> <li>• Successful training of the Client Support Assistants.</li> <li>• The effective management of client’s insurance requirements, Insurers, and other parties in a professional and timely manner.</li> <li>• Management of client renewals, including renewal documentation, renewal quotations and accounting procedures ensuring company and FCA requirements are adhered to.</li> <li>• To ensure the accurate input of data onto the Company office systems and generation of reports.</li> <li>• To ensure the timely administration of mid-term and year-end adjustments.</li> <li>• To meet CPD requirements.</li> </ul>

<ul style="list-style-type: none"> <li>• Skills and competencies:</li> </ul>	<ul style="list-style-type: none"> <li>• Self-motivated with a proactive approach to problem solving.</li> <li>• Intermediate/advanced use of Microsoft, Excel, Outlook, Word &amp; Publisher.</li> <li>• Strong communicator as the role will involve discussion with Insured's and/or Clients, Underwriters, and assistance Companies by phone, email and face to face.</li> <li>• Attention to detail as print and document proofing is an important part of this role.</li> <li>• Ability to prioritise when under pressure.</li> <li>• The ability to assist in assessing Client needs and support to convert prospects to orders.</li> <li>• Flexibility with the ability to work alone and as part of a team.</li> <li>• Strong planning, organisational and time management skills</li> <li>• Ability to adhere to and implement relevant Company policies.</li> </ul>
<p>Knowledge and experience desired:</p>	<ul style="list-style-type: none"> <li>• Good knowledge and understanding of the principles of Insurance.</li> <li>• Awareness and understanding of the UK Employee Benefits market.</li> <li>• FCA Compliance requirements</li> <li>• Technical experience required from previous sound experience, understanding and working knowledge of insurance, ideally within Travel and Personal Accident insurance.</li> </ul>
<p>Qualifications:</p>	<ul style="list-style-type: none"> <li>• CII Certificate (or working towards this qualification), alternatively an A-Level standard of education or equivalent is acceptable.</li> </ul>
<p>Other</p>	<ul style="list-style-type: none"> <li>• Any other duties requested by Senior Management to fulfil the job purpose.</li> </ul>