

Commercial Account Handler

Woodley, Reading

Summary;

Finch Group are looking for an 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, compiling client information and fact finds, liaising with insurers on quotations and placing cover when instructed, inviting and confirming renewals, dealing with mid-term adjustments and providing assistance with claims issues when appropriate and collection of money when requested.

Our office is based in the highly convenient location of Woodley Town Centre.

The ideal candidate should be articulate and numerate and have good all-round communication and administration skills. They will need to be a good team player to compliment our established Commercial Department.

Previous experience is preferred, along with knowledge of Open Gi.

Responsibilities;

Processes:

- Complete fact finds and manage client data records
- Check thoroughly all client documentation before despatch, ensuring queries are raised, amendments completed and contract certainty is achieved
- 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 notes
- Electronic filing of client documents and information on a regular basis
- Assist, when required, with the Accounts function of the business in carrying out credit control with relevant customers. Working with the Account | Executives to ensure the collection of monies from clients within the Company's agreed credit period, whilst maintaining good relationships with those clients and with insurers
- Monitor the renewal spreadsheet to ensure compliance with the companies "Renewal Improvement Plan" process
- Work closely with Account Executives to manage client work flow

Staff:

- Any duties that may be required by your Account Executives in accordance with the nature of this job and liaison with claims and accounts colleagues.
- Being part of your Technical Support Team and being considerate of other teams and their needs

Customer:

- 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 job requires knowledge of:

Processes:

- Relevant sections of the Road Traffic Acts
- Rehabilitation of Offenders, Disability Discrimination and Race Relations Acts
- The Data Protection Act
- Requirements of money laundering legislation
- The Law of Agency
- Credit management procedures
- The Insurance Act

The Role

Finch Group is a Top 50 Insurance Broker, with a history dating back to 1971, we are an Independent Broker and a Broker Network Partner. We have recently been shortlisted as 'Commercial Lines Broker of the Year' at the Insurance Times Awards 2018.

This role is full time, based in our Head Office in Woodley.

Benefits

- Pension
- Death in service
- Bonus
- Free fruit and biscuits
- 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****