

## Account Executive

### Private Client Insurance

Woodley, Reading

#### Summary;

Finch Group are looking for an Account Executive to join our highly enthusiastic and established team. This is a role working within a team of Account Executives and Account Handlers to deliver a comprehensive insurance service to existing and potential new clients.

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 skills. They will need to be a good team player to compliment our established Private Client Department.

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

#### About Finch Group

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 Reading Head Office (located in Woodley Town Centre).

#### The successful candidate would be responsible for;

Achieving agreed Company forecasts, plans, targets and budgets for the development of existing and new customers.

Providing a comprehensive Personal insurance service to existing and potential new customers.

Developing an initial and ongoing knowledge and understanding of customer requirements, and ensure these are met at all times.

Offering advice and guidance on risk management issues.

#### Responsibilities;

- To be responsible for achievement of all sales forecasts, plans, programmes and budgets in your respective sales area
- Monitor performance against objectives, forecasts, plans, targets and budgets and provide regular feedback to the Senior Account Executive and the Broking Manager in this respect
- To maintain appropriate, regular contact with existing customers, to ensure their insurance requirements continue to be met

- To identify and acquire new customers for the business in line with objectives, forecasts, plans, targets and budgets
- To work closely with the Internal Sales function, ensuring a high level of customer satisfaction
- Identify, recommend and agree corrective action with the Senior Account Executive and the Broking Manager as appropriate, where deviations in performance below plans occur, or where other problems arise affecting sales or customer satisfaction
- To promote and maintain a high Company image of professionalism, competence and customer satisfaction
- To ensure customers' credit is within agreed Company limits at all times, and assist Accounts Department with securing payment of invoices outstanding beyond normal terms and periods of payment
- 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.

## **KNOWLEDGE:**

### ***The job requires a thorough knowledge of:***

- The principles, practices and legalities of General Insurance
- The UK General Insurance market in respect of Personal insurances
- FCA Regulations for dealing with Personal Customers
- Report writing and presentation techniques
- Sales techniques and methods
- Budget assessing methods and requirements
- Credit management procedures

### ***The job requires knowledge of:***

- The operation of the Company's IT system, including procedures, authority limits and audit trails
- The Data Protection Act
- Requirements of money laundering legislation
- FCA regulations for dealing with Client Money and Treating Customers Fairly
- The Law of Agency
- Rehabilitation of Offenders, Disability Discrimination and Race Relations Acts

- The general functions of all other areas of the Company and how these relate to this role

## Benefits

- Pension
- Death in service
- Bonus
- Competitive salary
- Convenient location

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](mailto:Jobs@finchgroup.net)

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