



**Holt Lunsford Insurance Agency
Property And Casualty Account Executive
(Exempt)**

Job Description

The property and casualty account executive role is a multifaceted position P&C role at Holt Lunsford Insurance Agency, an affiliated of Holt Lunsford Commercial. Your primary duty is to ensure the growth of a real estate package program. The role will entail handling inbound cross selling opportunities from other Holt Lunsford business units and networking in the real estate community as well as placing outbound phone calls and email to new prospects.

Other duties included are handling the renewal process for the program and corporate coverages, billing clients, premium allocations, facilitating the claims process, passing along certificate of insurance requests to broker partners, limited risk management duties for other business units, gathering underwriting information to quote business, and general customer service-related duties.

Supervision

Reports to: Chief Operating Officer and/or Senior Controller

Responsible for: N/A

General Qualifications Required

Education: Bachelor's Degree or Bachelor of Science Degree

Experience: Minimum of two (2) years of experience

Skills/Behaviors:

- Working knowledge of risk management and related aspects of insurance coverage
- Self-motivated to contact clients and potential clients on HLC insurance program and determine how HLC program can add more value over their current coverage and costs
- Knowledge of insurance billings from the carriers and to owners
- Knowledge with property and casualty claim process
- Ability to handle multiple tasks while meeting strict deadlines
- Ability to adapt to change
- Detail-oriented
- Self-discipline, professionalism and commitment to excellence

Major Areas of Responsibility

- Review and understand lender requirements for insurance and related certificates
- Obtain certificates for owners and lenders, and review certificates for accuracy
- Maintain the following lists:
 - Loss payable and mortgagee clause of lenders insured including loan numbers
 - Named insureds including addresses
 - Properties covered with building and billing information
- Review insurance billings from carriers for the covered properties including adds and deletes to make sure they are processed appropriately



- Work with brokers to add properties to the program including prepare or review the Statement of Values and related building information schedule.
- Prepare insurance invoices to the owners.
- Work with property managers and carrier's adjuster on insurance related issues and claims as appropriate.
- Other duties as assigned.