



Account Manager * Mike Preis, Inc. Jeffersonville, NY

Overview: Mike Preis, Inc. is seeking a Personal Lines Insurance Account Manager in Jeffersonville, NY. The Personal Lines Insurance Account Manager develops and maintains client relationships, driving sales, and ensuring comprehensive coverage through effective account reviewing and rounding. The ideal candidate will excel in delivering exceptional customer service, identifying cross-selling opportunities, and providing tailored insurance solutions to meet our clients' needs.

Responsibilities include;

Proactively identify and pursue sales opportunities within the personal line's portfolio.

Conduct account reviews to uncover gaps in coverage and recommend appropriate products or services to enhance client protection.

Cross-sells and up-sells personal insurance products, including auto, home, umbrella, and specialty policies.

Meet or exceed premium, policy and customer growth goals.

Serves as the primary point of contact for clients, delivering timely responses and resolving inquiries or concerns.

Builds strong client relationships to encourage retention and referrals.

Processes policy renewals, endorsements, and other changes promptly and accurately with the assistance of our Personal Lines Assistant.

Ensures compliance with underwriting guidelines, company policies, and state regulations.

Educates clients on their insurance options, policy terms, and coverage benefits.

Advocates for clients during claims processes when needed.

Stays informed of industry trends, new products, and regulatory updates to provide clients with the best possible advice.

Maintains accurate records of client interactions, sales activities, and policy details in the agency management system.

Other duties as necessary or assigned.

Skills required for job;

Applied Epic experience preferred.

Strong knowledge of personal lines products, including auto, homeowners, renters, and umbrella insurance.

Exceptional interpersonal and communication skills, with the ability to build trust and rapport.

Highly organized, detail-oriented, and adept at managing multiple priorities.

Goal-oriented mindset with a passion for helping clients protect what matters most

Requirements:

High School Diploma

Reference Check

Valid Driver's License

3+ years of experience selling personal lines of insurance preferred.

Proven experience in insurance sales or personal lines account management, preferred.

Active NYS Property & Casualty Insurance license will be necessary.

Shift, Salary, and benefits: This is a full-time position, Monday-Friday, \$40,000 - \$65,000 yearly, Benefits include; Health Insurance, Paid Vacation, Paid Sick Leave, Holidays, and 401(k)/Retirement.

Apply by sending an email with your resume to Galessi@trubuffalohr.com.