



Job Description

Job Title: HOA Account Manager
Business Line: HOA
Reports To: HOA Administrative Supervisor
FLSA Status: Non-Exempt
Approved By: HOA Business Unit Manager
Approved Date: January 18, 2019

OUR MISSION:

Our mission is to establish long-term, mutually beneficial financial relationships with our clients, team members and community. We will:

- Recruit, reward and retain a team of market leading professionals.
- Collaborate with clients to analyze and understand their financial challenges and opportunities.
- Develop and provide access to a unique set of financial solutions.
- Directly engage in community social, educational and philanthropic activities.

WHY CB INSURANCE?

- Locally-owned agency with long history of exceptional service to clients.
- Flexible work locations – offices in both Denver and Colorado Springs.
- Flexible work schedule.
- Tuition reimbursement and continuing education opportunities.
- Competitive pay and benefits package.

SUMMARY:

An HOA Account Manager provides a high level of support to the Producer/Account Executive to manage a book of business, while acting with a high degree of independent discretion, autonomy, and decision-making.

KEY FUNCTIONS AND RESPONSIBILITIES:

- Determine appropriate markets for each renewal account.
- Prepare renewal specification summaries.
- Prepare Acord applications from Agency Management System.
- Compare quotes for coverage, limits, and pricing.
- Negotiate terms, conditions, and pricing of account with assistance of Account Executive or Producer, if needed.
- Prepare proposals and participate in proposal presentations or other meetings as required.
- Complete surplus lines due diligence and affidavits, when applicable.



- Perform general insurance tasks, as necessary, which may include invoicing, certificates, and endorsements.
- Responsible for integrity of policy data on Agency Management System.
- Functional in navigating Agency Management System.
- Provide world-class customer service.
- Participate in training to enhance knowledge and skills, remaining current with industry changes.
- May occasionally require overtime at the discretion of management.

REQUIRED EXPERIENCE & BACKGROUND

- One to three years' experience in commercial insurance preferred, but not required.
- Current Colorado driver's license.
- Ability to work independently.
- Ability to focus and maintain attention to detail.
- Excellent customer service and teamwork skills.
- Solid organizational skills.
- Good oral and written communication skills.
- Working knowledge of the Microsoft Office suite (Outlook, Excel, Word).
- Bachelor's Degree is preferred, but not required.

HOW TO APPLY

Please email your resume to HR@CentralBancorp.com

Note: This job description is not intended to be an exhaustive list of all duties, responsibilities or qualifications associated with this job. The employee is expected to perform those duties listed as well as other related duties directed by management.