

Commercial Lines Account Support Specialist

Foundation Insurance Group

6-2023

Job Summary

Company: Foundation Insurance Group
Industry: Insurance
Education: Bachelors' Degree
Contact: Bob Weir

Location: Falls Church, VA
Job Type: Full Time – Salary – Exempt
Experience: Experienced
Work Hours: Monday – Friday; 8am to 5pm

Purpose of position

To fully participate in helping FIG realize its mission, aligning with its core values, and achieving its annual goals by fulfilling the roles and responsibilities listed below.

Job Description

The Commercial Lines –Account Support Specialist/Customer Service Representative (CL CSR) is responsible for working with a team of fellow CSRs, Producers (those writing the business), and Account Managers (those assigned to service accounts). The CL CSR directly supports Account Management and has an essential role as he/she is responsible for maintaining a positive relationship with our clients by directly supporting business owners. The CL CSR works on many critical time-sensitive tasks. While this is an entry-level position in our organization, this role is a pivotal member of the Commercial Lines team. Additionally:

After 90 days of employment at Foundation, we support you to get your insurance license if you so choose. Costs for licensing and gaining further credentials are company sponsored, creating a clear path for professional development and a career in a growing and ever-changing industry.

Job Requirements:

- Have at least 1 year of Commercial Lines Insurance Sales Support experience
- Be ethical, professional, intelligent, personable, highly motivated, energetic, and responsible
- Exhibit critical thinking, excellent written and verbal communication, ability to multi-task, and organization
- Have strong computer proficiency in MS Office and other management systems

Preferred Qualifications:

- Property & Casualty Insurance License
- Knowledge of Applied/EPIC
- Experience with Erie, Travelers, Donegal, and/or Hanover underwriting guidelines & quoting systems
- Professional designations
- Bilingual Spanish/English speaker

Job Responsibilities

Below is a list of tasks. If you're unfamiliar with any of them, not to worry. We will train you!

- Issuing Proof of Insurance accurately and in a timely manner (primary role of the CL CSR)
- Creating and sending binders, letters, and other correspondence.
- Processing pending cancellations, cancellations, and reinstatements.
- Aiding clients with completion of audit requirements.
- Assisting clients with billing questions and payment processing.
- Processing requests for Loss Runs.
- Submitting change requests to appropriate carriers.

About Foundation Insurance Group, Inc.

Foundation Insurance Group is an independent insurance agency located in Falls Church, Virginia and Louisville, KY writing Commercial, Personal and Life insurance business. We have been blessed with an amazing team which has allowed us to be profitable and grow at a rapid rate.

Our insurance agency consistently wins awards for production, excellence, and service. Most recently, we won the 2021 National Award for PIA's Professional Agent of the Year. We are a three-time winner of Erie's coveted Quality Agency Award, and we consistently achieve top marks for Erie's Elite. Additionally, Foundation has won awards for our contribution to serving the community.

Foundation maintains a family-feel environment and a strong culture, which is very important to us. We are a growth-oriented company and recognize that our team is our true asset.

Foundation Insurance Group (FIG) Mission

To be part of the "Top 100 Property/Casualty Agencies" privately held, and the largest and most profitable Erie agent. This will enable us to provide greater services to our customers, better opportunities for our employees, and increase our ability to give back to the communities we serve.

Foundation Insurance Group (FIG) Vision

To set the standard of excellence in the insurance and risk management profession by serving those we encounter with distinction using God's principles as our guide.

Our Core Values

To be successful in this position and an integral part of our team you must identify with and follow our core values:

- ***Service***
- ***Honesty/Integrity***
- ***Relationships***
- ***Professionalism / Knowledge***
- ***Competitiveness***

Benefits:

We offer a strong benefits package that includes the following:

- A competitive salary that is commensurate with experience
- Health, dental, and vision insurance
- Long & short-term disability insurance
- Life insurance
- 401k
- FSA
- Generous PTO