

# **(|B|) Broadview<sup>SM</sup>**

## **Insurance Agency**

### **Personal Lines Customer Service Representative**

Located in Schenectady, NY  
Full-Time Remote Position | Job Requisition ID R2524

If you are ready to join a company that truly cares about its employees, our members, and our community then you have come to the right place!

#### **Overview of Your Role**

The Personal Lines Customer Service Representative identifies, contacts, and develops prospective insurance clients, and oversees clients' business in the personal lines of insurance, following Broadview and NYS practices. The position is responsible for providing prompt, accurate, courteous service to customers, producers and company personnel.

#### **Accountabilities and Responsibilities**

- Growing and developing talents and insurance knowledge to highest level possible; providing, with a positive attitude, a high level of support in obtaining, maintaining, expanding and servicing personal accounts.
- Handle and process new and renewal personal lines business.
- Provide personal lines quotes.
- Meet sales and revenue objectives.
- Provide in-house customer service to clients as assigned and requested.
- Market new business, determine premiums, prepare and present proposals to clients and maintain underwriting and marketing information by carrier.
- Check new and renewal policies for accuracy in rating, typing, coverages, signatures, and input these transactions to generate billing invoices.
- Ensure that these items are delivered and/or mailed to client.
- Receive phone calls from clients and companies regarding insurance, claims, or administrative problems, and comply with the request and/or refer to the company only when necessary.
- Report and follow up on overdue and suspense items.
- Be familiar with and follow agency E&O guidelines.
- Maintain electronic and/or paper files in an orderly, up-to-date manner.
- Perform special projects at management's request.
- Other duties as needed

#### **Credentials, Experience and Skills**

- High School or Graduate Equivalency Diploma is required.
- Knowledge of computer systems and operations is desirable
- Good listening skills and attention to detail are important
- Knowledge of personal insurance and products is essential
- Must be eligible for bonding, Hold NY State Property and Casualty, or Agent's or Broker's license and any required continuing education
- Your ability to be bonded is required

Starting Compensation: \$18.00/hr. and up based on experience, plus a competitive benefits package

Bilingual individuals who are fluent in a second language in addition to English are highly encouraged to apply.

We are an equal opportunity employer. We do not discriminate on the basis of race, creed, color, national origin, religion, sex, age, veteran status, disability, genetic information, gender identity, or any other protected class.

Broadview FCU is committed to ensuring individuals with disabilities and/or those who have special needs participate in the workforce and are afforded equal opportunity to apply and compete for jobs. Please contact us regarding the accessibility of our Website or if you need assistance completing the application process.

**Please send resume to [nwilson@capcomfcu.org](mailto:nwilson@capcomfcu.org)**