

Commercial Lines Assistant Account Manager

About Us:

MountainOne is a mutual holding company headquartered in North Adams, Massachusetts. Banking, Insurance, and Investment products are offered at full service offices in the Berkshires (Pittsfield, North Adams, Williamstown) and on Boston's South Shore (Quincy, Rockland, Scituate). MountainOne is dedicated to the local communities we serve, with a mission of delivering solutions of real value that help individuals, businesses, and community institutions manage their financial lives with clarity and confidence.

- **MountainOne Bank**, founded in 1848, provides a complete array of personal and business banking and electronic services.
- **MountainOne Insurance** provides personal and business insurance, bonding services and group benefits solutions.
- **MountainOne Investments** provides individual investment services and group financial benefit plans (financial professionals offering securities and advisory services through Commonwealth Financial Network[®], Member FINRA/SIPC, a Registered Investment Advisor)

Position Description:

The Commercial Lines Assistant Account Manager will provide exceptional service in accordance with MountainOne's customer service standards. The CL Assistant Account Manager will provide friendly and helpful support and assistance to multiple Account Managers. It is the responsibility of CL Assistant Account Manager to work with the CL Account Managers and help them to serve clients efficiently and professionally.

Below is a description of the ordinary duties of the position. This description is intended as a guideline and may not be all-inclusive. There may/will be additional duties and responsibilities both related and unrelated to the department, which will require attention and therefore will be required.

Employee access to a customer's nonpublic personal information shall be limited to the extent necessary in order to accomplish the duties outlined below or as may be assigned

Primary Responsibilities:

- Document all communications and interactions with Account Managers, Producers, clients, carriers and others in the computer system;

- Update and maintain accurate client data such as address, phone numbers, email addresses and other contact information;
- Communicate with company personnel regarding client account questions, billing issues via phone, e-mail, and written communication;
- Initiate appropriate policy and endorsement issuance via in-house computer and internet, as well as any other supplemental forms, reports, etc. as directed by the Account Managers;
- Issue Client Certificates of Insurance. Review client's insurance coverage for compliance and refer any complicated Certificate requests back to Account Managers for review;
- Work with Account Manager to send Worker's Compensation and excess market renewal quotes and requirements to insured;
- Communicate with insureds' regarding premium payments and billing questions;
- MA RTA forms – create, stamp and issue as needed. Submit change requests to carriers as needed;
- Assist Account Managers with renewal remarket and quoting;
- Any other duties as assigned;

Secondary Responsibilities:


- Create renewal summaries, proposals or policy information as needed;
- Work with staff, supervisors, and management to institute and implement departmental policies and procedures;
- Maintain compliance with all related company policies, standardized procedures and regulations.

Qualifications:

- High school diploma;
- Work towards obtaining and then maintain MA Property & Casualty Insurance Broker's License and any other license as required by residence state;
- Understanding of insurance work methods and procedures;
- Ability to verbally effectively present information to clients, company and agency staff;
- Ability to be self-motivated, provide problem-solving capabilities and prioritize multiple tasks;
- Commitment to the company's culture and established service standards;
- Ability to deal with and show discretion in confidential matters;
- 25% availability to travel outside of 25-mile radius and report to any office;
- Ability to sit, drive, bend, answer the phone, and perform computer input.

To Apply:

Please email your resume and letter of interest to: careers@mountainone.com. MountainOne is an Equal Opportunity Employer. All qualified applicants will receive consideration for employment without regard to race, color, religion, gender, national origin, age, disability, or veteran status. (Compliant with VEVRAA and Section 503 rules)

MountainOne Bank is Member FDIC. Member DIF.  Equal Housing Lender.

Insurance and Investments are not insured by the FDIC and are not deposits or other obligations of, or guaranteed by, any depository institution. Funds are subject to investment risks, including possible loss of principal investment.

The financial advisors of MountainOne Investments offer securities and advisory services through Commonwealth Financial Network®, member FINRA/SIPC, a Registered Investment Adviser. Fixed insurance products and services offered through CES Insurance Agency or MountainOne Investments. MountainOne Bank is not a registered broker-dealer or Registered Investment Adviser. MountainOne Bank and MountainOne Insurance are not affiliated with Commonwealth. MountainOne Investments' main office is located at 85 Main Street, Suite 100, North Adams, MA 01247. (413) 664-4025.