

## Personal Lines Account Manager MountainOne Insurance Agency

### 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<sup>®</sup>, Member FINRA/SIPC, a Registered Investment Advisor)

### Position Description:

MountainOne Insurance currently has a full-time Personal Lines Account Manager position available in our North Adams branch. We are seeking a friendly and proactive customer service professional to provide exceptional service in accordance with MountainOne's customer service standards. The Personal Lines Account Manager will play a key role in the daily operations of MountainOne Insurance Agency. In this important role, the PL Account Manager will provide friendly and helpful support and assistance to personal lines insurance clients. It is the responsibility of the PL Account Manager to serve clients efficiently and professionally and to maintain a high level of industry knowledge and to know their customers and fully understand their needs. **In an effort to maintain a safe and healthy workplace, MountainOne now requires that all applicants for employment demonstrate that they have been fully vaccinated for COVID-19 as a condition of hire.**

### Key Accountabilities and Responsibilities:

- Discuss insurance needs and policy coverages with clients via phone, e-mail, written communication, and in person;

- Document all communications and interactions with clients, carriers and others in the computer system;
- Address insured's questions and concerns regarding policies, coverage, and premium payments promptly via phone, e-mail, written communication, and in person;
- Update and maintain accurate client data such as address, phone numbers, email addresses and other contact information;
- Actively conduct account reviews;
- Round and upsell client account coverage.
- Communicate with company personnel regarding coverage availability 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.;
- 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;
- Continuing education to keep abreast of company, agency, and computer updates.
- Any other duties as assigned;
- Handle insured's premium payments, via in-house or internet payment methods;
- Perform same work-related responsibilities to other company locations, as required.

## **Qualifications:**

- High school diploma;
- Obtain and 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](mailto: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