

**Job Title:**

Account Executive

**Role Holder:**

Vacancy

**Reports to:**

**Overall role:**

**Responsible for supporting placing and servicing to meet client needs, maintain client loyalty and renewal, and encourage business growth.**

## **Key Accountabilities**

### **Account Servicing and Development**

Identify and manage client requirements in accordance with the terms of appointment.

### **Renewal Management**

Plan and co-ordinate renewal strategies.

### **Account Reporting**

Monitor and report development, trends and issues in the client relationship.

### **Client Education**

Educate clients and manage client expectations through market, insurance and sector briefings.

### **File Management**

Co-ordinate and manage client and placement records

## **Competence Indicators**

- All placing, contract and closing documentation satisfies the client requirements and complies with Internal Procedures/BPM and Market Reform.
- Placement submissions are in accordance with Contract Certainty Code of Practice
- Manages client requirements in accordance with the terms of appointment, to maintain a strong client relationship, support renewal and encourage additional business
- Ensures that clients have and agree to UIB terms of trade.
- Ensures agreed payment terms, Premium Payment Warranties etc are met through credit control and reconciling unallocated cash.
- Responds timely and accurately to client and underwriter queries.
- Clients receive a quality of service that adds value.
- No justified client complaints over provision of service.
- Contributes to retention targets through planned and coordinated account renewal.
- Identifies and develops opportunities for account development to meet the client's requirements.
- Ensures that correspondence, documents, statistics etc are retained on file in accordance with BPM and internal procedures.
- Prepares monthly Divisional Management Information (MI) to accurately report, brokerage and fees, renewal lists/progress, late signings etc
- Identifies and reports suspicious financial circumstances or transactions directly to the Financial Crime Reporting Officer.

**Direct Reports**

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**Internal Relationships**

Broking, Technical/Wordings functions, Claims and Accounts
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**External Relationships**

Underwriters, Client Risk/Insurance Managers in client companies, trade bodies and associations
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**Desirable Experience**

London or international market experience in either broking or underwriting, Account servicing to large international corporations; technical insurance
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**Generic Knowledge and Skills**

Market and industry structure and operation, including regulation and market reform Lloyd's Introductory Test, or equivalent experience Technical insurance to CertCII, or equivalent experience Sector specific risks and insurance products/solutions Slip drafting Negotiation Well developed verbal and written communication Client servicing and account development IT literacy in Word, Outlook and Excel (Basic) Relationship management Planning and organising Time management and prioritisation
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**UIB Knowledge and Skills**

FSA – ICOB and Money Laundering/Prevention of financial crime UIB placing process UIB Products and Services Core IT systems. TWINS: can enter and retrieve information.
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