



## Personal Risk Management – Sr. Client Manager

G2 Insurance Services is seeking a candidate for the position of Sr. Client Manager to join our growing Personal Risk Management Team. G2 is looking for professionals to add to our team, and assist in the delivery of personal risk management services to our private clients. The Sr. Client Manager position is a client facing position working from our San Francisco office, reporting to the Director of Personal Risk Management.

### Key Responsibilities

- Pro-active approach with clients and colleagues in the day to day service; exceeding their service expectations
- Extensive knowledge of all personal insurance products and markets
- Manage and assist with sales process
- Perform pre-renewal process per company guidelines, manage expiration reports, renewals and endorsements in a timely manner
- Maintain appropriate records of service, marketing, and policy communications with clients and carriers
- Inform and educate clients regarding coverage, exclusions and exposures; conduct face to face client meetings as necessary
- Reporting of claims and acting as liaison with client and as their advocate through entire claim process.

### Skills & Experience

- Current California Property & Casualty License with a minimum of five years of experience
- Strong working knowledge of insurance carrier websites and proficient in their rating systems
- Excellent written and oral communications and negotiation skills
- Proficient with Microsoft Office-Word & Excel
- Strong time-management skills, organizational skills, multi-tasking skills and ability to prioritize
- Ability to work independently as well as part of a team
- Experience with Epic preferred
- Insurance designations such as CIC or CISR a plus

G2 Insurance offers competitive salaries and comprehensive benefits and programs including: health and welfare, tuition assistance, 401K, employee assistance program, career mobility, volunteer opportunities, along with many other programs. For more information about G2, please visit us at: <http://www.G2insurance.com> .

G2 is an equal employment opportunity employer.