



## Personal Risk Management – Client Manager

G2 Insurance Services is seeking a candidate for the position of Client Manager to join our growing Personal Risk Management Team. G2 is looking for an experience service-oriented insurance professional to add to our team to assist in the delivery of personal risk management services to our private clients. The Client Manager position is client facing and reports to the Director of Personal Risk Management. The position will sit in G2's Walnut Creek office; however, for the right fit, there may be flexibility with sitting in San Francisco.

### Responsibilities

- Proactive approach with clients and colleagues in the day to day service; exceeding their service expectations
- Maintain and demonstrate knowledge of all personal insurance products and markets
- Assist with the 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.
- 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 3-5 years of relevant 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, primarily 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

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.

*Pursuant to the San Francisco Fair Chance Ordinance, we will consider for employment, qualified applicants with arrest and conviction records.*