



COMMERCIAL INSURANCE ACCOUNT MANAGER

BIS is an independently owned benefit and commercial insurance broker located in Roswell, GA. Our mission is to serve others through responsive insurance advising. We aim to excel in our industry while maintaining our commitment to service, integrity, faith, and excellence. We have an unwavering commitment to both our employees and our clients. This has earned us the prestigious recognition of being named one of the Best Places to Work by the Atlanta Business Chronicle for multiple years, as well as one of the Best Places to Work in Insurance.

The Commercial Insurance Account Manager will serve as the primary liaison between clients, producers, and insurance carriers. They manage day-to-day client relations, process policy changes, handle renewals, and ensure proper coverage for business risks. The ideal candidate will provide exceptional client support while ensuring accurate coverage solutions and fostering strong carrier relationships.

KEY RESPONSIBILITIES

Client Service & Account Management

- Manage a portfolio of commercial insurance accounts and provide responsive day-to-day client service.
- Answer client questions regarding coverage, policy changes, and insurance requirements.
- Process endorsements, policy changes, certificates of insurance, and auto ID cards.
- Assist clients with claims reporting and coverage-related inquiries.
- Maintain accurate client records and documentation within agency management and CRM systems.

Renewals

- Prepare renewal proposals, coverage comparisons, and client presentations.
- Review expiring policies, analyze current exposures, and identify coverage needs.
- Coordinate policy binding and delivery of coverage documents.
- Maintain relationships with carrier partners and stay informed on market trends and product offerings.

Operations & Compliance

- Review policies, endorsements, audits, and related documents for accuracy.
- Support premium audits, billing inquiries, and policy administration activities.
- Ensure compliance with agency procedures and industry regulations.
- Utilize agency management systems to manage workflows, document interactions, and track account activity.

QUALIFICATIONS

- Must meet our value system.
- 3-5 years of commercial insurance experience preferred.
- Proficiency with Applied Systems Epic or similar agency management tools preferred but not required.
- Experience with ACORD applications.
- Strong analytical skills and attention to detail.
- Knowledge of industry regulations and market trends.
- Ability to thrive in a fast-paced, collaborative environment.

TO BE A TEAM
MEMBER AT BIS,
WE REQUIRE THESE
VALUE SYSTEMS :

Follow Through

Solve all items and
provide updates

Humble

Not arrogant

Heart to Serve

Genuinely care about
others

Integrity

Do the right thing

Heart to Learn

Care about your craft and
want to improve in life

Perspective

Don't take yourself too
seriously, and family is
priority

