



Exciting Opportunity- Insurance Account Handler- Commercial Broking

Based- City

About Acorn to Oaks Financial Services Ltd

- ✓ Established in 2008, Midlands based Commercial Insurance Brokerage- offering wider financial services to our clients. We are independently authorised, whole of market. A member of the Cobra Network with access to a wide variety of insurers including the Lloyds market.
- ✓ 2019 Acquired by City of London Group plc. City of London Group offer a number of services to SME clients
- ✓ We are proud of our current team of 15 staff who share a passion for great customer service and doing the right thing each time we have a customer interaction. We are about building and developing long term relationships with our clients.
- ✓ We like to get to know our customers which means visiting them and understanding how they work to ensure that their insurance is on the right basis. We handle our client relationships end to end, including claims/ attending insurer surveys etc. We encourage staff to be available for clients. Our pricing strategy is fair, we do not impose silly fees or expensive interest rates on finance. We want the client to know we have their best interest at heart

The role

This role will be attractive for someone who has been insurance broking SME's for at least 3 years. We are looking for someone who is enthusiastic and confident when dealing with clients and insurers. This will be a varied role, the candidate will deal with clients from a range of industries from start-ups to corporates. We are launching into London, so we will go to networking events and call on clients to introduce our services. This will be an interesting job opportunity for the right person.

General responsibilities:

- ✓ Administration and service of a portfolio of commercial clients, including- visiting clients, presenting clients to insurers, negotiating premiums, processing midterm adjustments, dealing with renewals, supporting claims, issuing client documentation.
- ✓ Business development and growth of portfolio
- ✓ Spot opportunities to help clients with their wider financial needs by referring opportunities to colleagues in the wider Acorn to Oaks team
- ✓ Maintain accurate records- we use acturis as our CRM system
- ✓ Adherence to our Compliance processes and FCA Regulations and Rules.
- ✓ In conjunction with colleagues build a positive culture and contribute to team working
- ✓ Undertake professional development training. We encourage staff to take exams.

The candidate

- ✓ Must have 3 years current Insurance broking experience
- ✓ CII Certificate would be an advantage or working towards this qualification
- ✓ Minimum A level/ or equivalent Level 3 qualification
- ✓ Must have excellent communication skills and be confident in their approach to meeting new/ existing clients.

Package

- ✓ Salary (subject to negotiation – depends on experience c£35000 plus bonus dependent on performance
- ✓ Pension Scheme
- ✓ Access to discounted wider services
- ✓ Paycare – benefits package
- ✓ CII exams- cost of exams paid by organisation

Start date

- ✓ January 2020

How to apply

Send a CV and covering email to claire@a2ofs.co.uk

Closing date for applications 15/11/2019