

Name: _____

Date: _____



JOB TITLE: Assistant Marketing Coordinator

REPORTS TO: VP, Commercial Lines

FLSA: Exempt

JOB SUMMARY:

The Assistant Marketing Coordinator works closely with agents to market and place new business accounts, ensure the completion of client files in their entirety including but not limited to, appropriate filing of paperwork, carrier subjectivities, payments, certificates of insurance, etc.

RESPONSIBILITIES:

- Assist in marketing new business submissions and obtain quotes in a timely manner.
- Negotiate pricing with brokers.
- Liaison between producers and clients to facilitate binding and complete files.
- Prepare binding orders to submit to brokers/carriers.
- Work with lenders to provide necessary documentation to ensure client meets all requirements for closing.
- Provide updated marketing information to the team regarding new products, etc.
- Meet with marketing representatives.
- Invoice clients and follow up for payment if necessary.
- Bill new accounts and work with accounting to ensure carriers are paid in a timely manner.
- Communicate with account executives in order to transition new clients for continued servicing.
- Provide new business reports on a monthly basis.
- Other duties as assigned.

JOB REQUIREMENTS:

- Education: High School Diploma or equivalent required.
- Experience: 1-3 years' experience in a similar position, preferred.

KNOWLEDGE, SKILLS AND ABILITIES:

- Ability to maintain a high level of confidentiality.
- Responds with a sense of urgency as required.
- Ability to work independently but also assists members of the team.
- High Degree of self-motivation, discipline, and discretion.
- Advanced time management and organization skills.
- Strong Microsoft Word, Outlook, and Excel knowledge.

WORKING CONDITIONS:

Name: _____

Date: _____



- Physical Effort: normal level of mental/visual effort associated with on-going use of PC and normal levels of physical effort.
- Work environment: normal office environment with minimal exposure to health or safety hazards.
- Equipment Used: PC and printer, telephone, copy machine, fax machine.

WORKING RELATIONSHIPS:

- Reports to the VP of Commercial Lines.
- Works with Marketing Manager Associate.
- Constant interaction with clients.

The above primary job duties and responsibilities describe the level and nature of work performed by the employees assigned to this job. The description should not be construed as an exhaustive listing of all job duties and responsibilities performed by this job.

Employee Name (Please Print)

Employee Signature

Date