

## **Finch Group Account Executive (Private Lines)**

Reporting Structure: Private Clients Director

Team Manager

Account Executive

### **JOB OBJECTIVE:**

To achieve agreed Company forecasts, plans, targets and budgets for the development of existing and new customers personal lines policies, including but not limited to Home, High Net Worth, Motor, travel and associated policies. We expect a comprehensive Personal insurance service to existing and potential new customers. To develop an initial and ongoing knowledge and understanding of customer requirements and ensure these are met at all times. Offer advice and guidance on risk management issues where required.

### **DUTIES AND RESPONSIBILITIES:**

- Monitor performance against objectives, forecasts, plans, targets and budgets and provide regular feedback to the Manager and the Director in this respect
- To maintain appropriate, regular contact with existing customers, to ensure their insurance requirements continue to be met
- To identify and acquire new customers for the business in line with objectives, forecasts, plans, targets and budgets
- Identify, recommend and agree corrective action with the Manager and the Director as appropriate, where deviations in performance below plans occur, or where other problems arise affecting sales or customer satisfaction
- To promote and maintain a high Company image of professionalism, competence and customer satisfaction
- To ensure customers' credit is within agreed Company limits at all times, and assist Accounts Department with securing payment of invoices outstanding beyond normal terms and periods of payment
- To be responsible for ensuring the collection of monies from clients within the Company's agreed credit period, whilst maintaining good relationships with those clients and with insurers.

### **KNOWLEDGE:**

***The job requires a thorough knowledge of:***

- The principles, practices and legalities of General Insurance
- The UK General Insurance market in respect of Personal insurances
- FCA Regulations for dealing with Personal Customers
- Sales techniques and methods
- Credit management procedures

***The job requires knowledge of:***

- The operation of the Company's IT system, including procedures, authority limits and audit trails
- The Data Protection Act
- Requirements of money laundering legislation
- FCA regulations for dealing with Client Money and Treating Customers Fairly
- The Law of Agency
- Rehabilitation of Offenders, Disability Discrimination and Race Relations Acts
- The general functions of all other areas of the Company and how these relate to this role

***NB:*** *This job description may be amended as the Company develops and in conjunction with the post holder.*

## **The Role**

Finch Group is a Top 50 Insurance Broker, with a history dating back to 1971, we are a part of Ethos Broking. We were shortlisted as 'Commercial Lines Broker of the Year' at the Insurance Times Awards.

This role is full time, based in either our Reading or Basingstoke Office. This job is office based, but may occasionally involve travelling to customers' premises, which in some instances may be completed outside of normal office hours.

## **Benefits** Reading/Basingstoke

- Pension
- Death in service
- Bonus
- Competitive salary
- The successful candidate will also have the opportunity to work towards their CII qualifications

We invite all qualified candidates to apply. Please note you must be eligible to work in the UK to be considered for this role. We thank everyone for their interest however only successful applicants will be contacted.

To Apply please forward your CV and covering letter to [Jobs@finchgroup.net](mailto:Jobs@finchgroup.net)

**\*\*NO AGENCIES OR PHONE CALLS PLEASE\*\***