

## ABOUT US

We are an independent, Ipswich-based Chartered Insurance Broker providing business insurance solutions to organisations in Suffolk and beyond.

Our people are at the heart of the quality service we provide to our clients and are our most important asset; investing in their continuous development is a significant business priority.

We are delighted to hold the Investor in People accreditation, demonstrating our commitment to excellent client service, delivered by professional, qualified people with a can-do attitude.

## WHAT WE OFFER YOU

- Competitive pay and bonuses
- Pension and life assurance
- Up to 25 days holiday (plus bank holidays)
- Days off for volunteering
- Financial support and rewards for study towards professional qualifications
- Wellbeing and worklife balance; providing breakfast, a cycle-to-work scheme, flu vaccinations and flexible working arrangements
- Reward schemes for those who go above and beyond
- Regular social events

# WE'RE RECRUITING ACCOUNT HANDLER

(Reporting to the Broking Manager)

### Role purpose - you will:

- Successfully manage a portfolio of existing client accounts in close collaboration with a Relationship Manager (Commercial clients) or directly (Small Business clients);
- When required, provide support for new business opportunities, including working on opportunities led by Relationship Managers;
- Where appropriate, attend client meetings in support of a Relationship Manager;
- Whether working alongside a Relationship Manager or on a direct account:
  - Develop a strong understanding of clients' businesses, their attitude to risk and their approach to insurance and risk management;
  - Clearly identify client demands and needs;
  - Accurately identify gaps in cover and potential cross-sell/upselling opportunities;
  - Gather, co-ordinate and update policy risk information and claims data;
  - Carry out pre-renewal work and broking exercises to ensure client demands and needs are met;
  - Prepare comprehensive and considered client reports, including risk presentations, pre-renewal and renewal reports;
  - Finalise renewal negotiations with clients and insurers using a calculated approach;
  - Thoroughly check insurer documentation to ensure that it reflects client instructions and cover expectations;
  - Process mid-term adjustments;
  - Be responsible for credit control and debt management.
- Build and maintain excellent working relationships with clients, prospects, colleagues, insurers, and other partners/suppliers;
- Act as a role model and technical referral point, sharing your knowledge and experience with the Client Servicing team;
- Support the Broking Manager with maintaining the quality of our service and pursuing continuous improvement.

## OUR VALUES

We are customer focused

We are committed to pursuing improvement, honouring our commitments, creating value and paying attention to the detail so we can deliver exceptional customer outcomes for our customers and clients.

We invest in our people

We are committed to being a 'Great Place to Work' where all of our people feel valued, involved, inspired, rewarded and supported to develop and grow.

We do good in our communities

We are committed to having a positive impact on all the communities we interact with – including our staff, clients and customers, suppliers and the locations in which we operate.

## HOW TO APPLY

If you're ready to apply for our Account Handler role, please email [del.sharman@poundgates.com](mailto:del.sharman@poundgates.com) attaching your CV and a covering note.

If you have any questions, please call Del on Tel: 01473 346030.

STRICTLY NO AGENCIES

## Required skills and experience - you will be:

- A proven commercial broker with strong experience and knowledge of a variety of classes of commercial insurance, including a good awareness of current market conditions;
- A strong client advocate, determined to achieve great client outcomes;
- A strong negotiator who maintains excellent working relationships at all levels;
- A problem solver with a resourceful, collaborative and analytical approach;
- Proactive in identifying and contributing viable solutions and embracing change;
- A clear communicator with excellent telephone manner, report writing skills and a strong attention to detail;
- Comfortable working on your own initiative and taking accountability;
- Collaborative in your approach and prepared to readily support colleagues where required;
- Highly organised with excellent time management skills;
- Qualified to at least Cert CII level and have over five years' commercial broking experience;
- A competent user of Microsoft programmes, including Word, Excel and PowerPoint;
- Competent user of Acturis (preferable but not essential);
- Fully conversant with and competent in all aspects of the FCA's ICOBS rules as it relates to the role and the importance of treating the customer fairly.



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We invest in people Standard



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