



**Department:** Personal Lines Insurance  
**Title:** Customer Service Representative / Tech  
**Location:** Key Biscayne, FL

### **Role Overview**

The Personal Lines Insurance Customer Service Representative/ Tech is responsible for supporting Account Managers in their daily duties and providing exceptional customer service to our private clients. Our preferred candidate has had experience working in insurance, ideally with high net worth clientele and their unique insurance needs.

### **Position Summary**

This position provides prompt, efficient, and high-quality service to client-facing colleagues to assist with behind the scene objectives.

You're the type of person who thrives on taking care of things the right way the first time. You are a detailed and analytical self-starter. You have a keen attention to detail, strong verbal and written communication skills and at least a moderate level of proficiency with computer applications such as Microsoft Word and Excel, with the ability to learn appropriate insurance company and firm software programs. You are great at multi-tasking, work efficiently, stay very organized and thrive in fast-paced environments.

### **Responsibilities**

- Communicate with clients regarding their policy(ies), document the detailed records of the communication in the client management program, and provide resolution to their concerns
- Document and process endorsements
- Follow up with the necessary contacts on items needed in order for policies to be issued
- Prepare documents for presenting risks to market
- Maintain a concern for timeliness and completeness when interacting with clients, the firm, and insurance company partners to minimize potential for errors and omissions claims

- Look for opportunities to improve the firm, business segment and processes
- Bring issues and discrepancies to appropriate leadership

### **Education, Experience, Skills & Abilities Requirements**

- Excellent written and verbal communication skills
- Moderate knowledge of Microsoft Excel and Word
- Ability to learn appropriate insurance company and firm software programs
- Demonstrate firm's core values, exuding behavior that is aligned with corporate culture
- Take initiative to contribute as a proactive and determined professional
- Current Florida 4-40 License, as required by the State Department of Insurance to provide client services as necessary in states where the firm functions, or be willing and able to obtain all required licenses within the first 90 days

### **Working Conditions**

- Fast-paced multi-tasking environment
- Job Type: Full-time
- Compensation: commensurate with experience and eligible for benefits

### **Language & Experience**

- Fluent in English and Spanish
- Personal Lines Insurance experience: 2 years (Preferred)

### **How to Apply**

- Send your CV and cover e-mail to [employment@pvginsurance.com](mailto:employment@pvginsurance.com)