



Job title: Trainee Account Handler (Motor Trade Insurance)

Reports to: Motor Trade Insurance Manager

Regulatory Regime SMCR: – Conduct Individual

Date: 25/02/22

Job purpose:

- To learn the role of an Account Handler and work towards industry qualifications
- To provide a professional service to prospects, clients and colleagues in respect of customer service, quotations, policy adjustments, renewals and claims for motor trade insurance
- To provide the highest standards of customer care, service and client retention while working towards common business goals and maintaining regulatory compliance at all times

Specific duties and responsibilities include, but are not limited to, the following:

- Liaising with clients directly in the broking, processing and daily administration of new business, mid-term alterations and renewals
- Learn how to provide complete professional insurance advice and service to existing clients.
- Assist your colleagues and learn how to negotiate with underwriters to find the most suitable insurance for a client at the best price
- Learn the full ABL Insurance sales process and assist in achieving agreed targets
- Learn the full range of ABL Insurance products and services including premium finance and risk management services
- Support the company's development plans for retention and growth of income
- Develop own breadth of awareness and understanding in the industry
- Ensure adherence to New Business and Renewal timeline procedures
- Work closely with Account Handlers and Executives on new business cases and renewals
- Respond to and handle complaints in accordance with FCA and internal requirements
- Deal with all allocated post on daily basis.
- Ensure the highest standards of customer care, service and client retention.
- Liaise with Claims Department to gather information on clients' claim history and impact this will have on future business.
- Maintain the company's good standing and ethos by providing the highest level of professional advice and service, acting professionally and ethically at all times



- Support Senior Managers as and when required.
- Learn how to raise debits and credits in an accurate and timely manner and liaise with the accounts team when necessary.
- Create and update both computer and paper-based records.
- Keep abreast of and assess the impact of external (such as legal and regulatory) changes as they relate to the role
- Carry out such other duties and responsibilities as the Board may request from time to time

#### Conduct Rules

- You must act with integrity
- You must act with due care, skill and diligence
- You must be open and cooperative with the FCA, the PRA and other regulators
- You must observe proper standards of market conduct

#### Key knowledge and skill requirements

- Interpersonal / Communication skills
- Flexible and adaptable to change
- Collaboration and teamwork
- Commercial awareness
- Strong organisational skills

#### Experience

- No specific professional experience is required for this role but literacy, numeracy, computer literacy and a positive, professional attitude are necessary to be successful

To apply please send a copy of your current CV to [hr@ablinsurance.co.uk](mailto:hr@ablinsurance.co.uk)