

# Job Description

## Client Associate – Strata Team

Lacher & Associates | 215.723.4378 | [www.lacherinsurance.com](http://www.lacherinsurance.com)  
632 East Broad Street, P.O. Box 64398, Souderton, PA 18964

### JOB PURPOSE

- Represent Lacher & Associates in a way that exhibits the firm's commitment to our Core Values and Purpose
- Support the critical functions of the Strata team (Personal & Commercial Insurance)

### JOB OBJECTIVES

- Support Advisors, Client Executives and Client Managers in the Strata Team
- Process work on a current basis following firm/carrier procedures
- Retain clients by providing professional service
- Follow and understand division procedures in completing tasks

### EDUCATIONAL REQUIREMENTS

As required by Pennsylvania law, this position will require the person to complete and pass the Property and Casualty exam. This position will also need to complete all state continuing educational requirements. The Certified Insurance Service Representative designation will be obtained by the end of the fourth year of employment.

### JOB SKILLS & QUALITIES REQUIRED

- Knowledge of insurance products and coverage
- Strong prioritization and organization skills
- Transfer identified work to a third party
- Excellent follow through skills
- Strong attention to detail
- Strong communication skills - written and oral
- Excellent and professional phone etiquette
- Efficient with time management and organization
- Proficient computer abilities with Power Point, Microsoft Word, Excel, client management systems and Internet skills
- Timely and accurate completion of tasks
- Neatness and consistency in work space according to procedures
- Willingness and ability to be a team player
- Eagerness to learn
- Open to change

### Core Purpose

We Free People to Enjoy Life

### Core Values

Honesty and Integrity

Serving Clients with Excellence

Building a Caring Community

Challenging Individuals to Grow Personally and Professionally

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### **SPECIFIC DUTIES**

- Establish work/personal goals on an annual basis with Executive Director
- Utilize the firm's technology, including all software and hardware applications
- Obtain endorsement proposals and process changes to policies per insured request
- Consistent and detailed noting of conversations and activities on a policyholder's account
- Process applications, new policies and renewals
- Conduct all mailed renewals
- Complete certificates of insurance
- Process incoming mail
- Report and aid in claims process
- Mail/email/fax appropriate signature forms
- Assist underwriters/carriers in obtaining information
- Take underwriting information for re-write or new insurance proposals
- Learn and utilize the internet and carrier's information online
- Execute Lacher & Associates client experience and client expectations standards
- Perform office or non-manual work directly related to the management policies or general business operations of Lacher & Associates or its clients
- Exercise discretion and independent judgment with respect to significant matters, which involves the comparison and the evaluation of possible courses of conduct and acting on making a decision after the various possibilities have been considered
- Utilize Yammer as internal communication tool

### **CLIENT EXPERIENCE**

- We strive to treat our clients with fairness, respect and dignity. Our clients are the people and companies with whom we do business, as well as our fellow co-workers. To that end, team members should embody the following traits:
- Be a team player
- Take care of your work area; be a good neighbor
- Give positive feedback to team members
- Have a positive attitude
- Return calls and emails within the same day
- Be accountable
- Do what you say you will do
- Exceed expectations

### **TEAM LEADER**

- This position reports to the Executive Director, Strata Team