

Title: Client Service Administrator (CSA)

Responsibilities:

1. **Client Support:**
 - Collaborate with Account Managers to provide comprehensive support in servicing client accounts.
 - Assist clients with inquiries, policy changes, and general account maintenance.
2. **Certificates of Insurance:**
 - Generate and issue certificates of insurance accurately and in a timely manner.
 - Ensure compliance with client and regulatory requirements for certificate issuance.
3. **Report Generation:**
 - Create and maintain monthly reports, including insurance expiration reports and claims reports.
 - Compile data and statistics to support decision-making and client communication.
4. **Documentation Management:**
 - Organize and maintain client files, policy documents, and endorsements.
 - Assist in the preparation and review of insurance documents for accuracy.
5. **Claims Assistance:**
 - Support Account Managers in the claims process by facilitating communication with clients and claims adjusters.
 - Assist in gathering necessary documentation for claims submissions.
6. **Client Communication:**
 - Communicate with clients to gather required information and update them on the status of their accounts.
 - Assist in preparing and delivering client presentations and proposals.