



Job Profile

Job Title	Corporate Broker 'TLD Corporate'	Name	TBC
Reports To	Client Service Manager	Region	T L Dallas Commercial
Location	TBC		

Purpose

The role is focused on ensuring the best service to large / multi risk / complex clients.

To provide full broking, technical & administration support to Account Execs and Directors in order for the team to retain & win corporate clients and provide excellent customer service.

Key Accountabilities

➤ Clients

- Processing and administration of client accounts including paper and computer records, accounting transactions and correspondence writing
- Maintaining client contact throughout the policy period. This should be done in conjunction with the Account Exec / Director. To visit the client where necessary, without Account Exec when required.
- Develop a robust relationship with all multiple contacts within our clients' organisations.
- Assisting clients with all enquiries following placement
- Have a working all round knowledge of corporate and complex covers.
- Conducting at least an annual review of cover requirements for clients
- Identifying client exposures and uninsured areas
- Obtaining best cover and wordings for clients
- Preparation of risk registers, insurer submissions, summaries of cover, and cover comparisons.
- Use technical knowledge to work with Claims team to ensure best possible outcomes for the client.
- Liaise with insurers on insurance programmes, new business enquiries, mid term amendments,
- Liaise with risk management, premium finance, and other third party suppliers

➤ Financials

- To help achieve revenue targets in the corporate area of the business. Supporting the Account Execs and Directors in the achievement of their targets.
- Opportunities to be identified in existing insurance programmes and also new/new business opportunities.
- Keep debtors controlled to only 2% of overall premium outstanding over 60 days.
- Maximise use of premium finance arrangements in line with TLD strategy.

- **Processes**
 - All activity to be focussed towards the best of client service.
 - Implement processes, as set out for Corporate business.
 - Ensure renewal & MTA processes are timely and efficient. Particular focus on pre-renewal work commencing at least 3 months prior to renewal to facilitate receipt of terms for client no less than 21 days prior to renewal (where possible).
 - Set up and lead PRISMs on all complex cases
 - Work with Group Placement Manager on TLD placement strategies, new and existing business, insurer relationships, and revenue maximisation.

- **Compliance**
 - CPD hours annual attainment
 - Completion of work in a compliant manner, and satisfy the auditing regime in the business.
 - Ensure TCF is embedded within all work
 - Use of endcustomer to understand our clients.

- **Corporate governance.**
 - Make sure that the Data security regime is adhered to.
 - To retain a clear desk according to the Clear desk policy
 - Complaints Procedures
 - Complaints Flowchart
 - Financial Crime Policy – Included Anti Money Laundering
 - Financial Sanctions Procedures
 - Ant-Bribery & Corruption Policy – Includes Inducements
 - Conduct Risk Policy
 - Vulnerable Customers Policy
 - Financial Promotions & Approval Procedures
 - Fraud Policy
 - Bring Your Own Device Policy (BYOD)
 - Information Security Policy
 - GDPR Policies/Procedures

- **Technical guidance / Training and Development**
 - To ensure that all Devzone courses are fulfilled in the year.
 - To ensure that there is a level of knowledge to deal with the size and complexity of the clients handled.
 - Attendance on technical courses where agreed
 - Attainment of CII professional qualifications, and others where appropriate

