



### **Open Position: Customer Service Representative**

Founded in 2008, Van Oppen & Co. 2 (VOCO2) is a specialty insurance broker exclusively provides business insurance solutions for Architectural, Engineering and Environmental Service Firm insured clients in the USA and Canada.

VOCO2 is a work from home employer – the position is based online work with heavy implementation of teams and zoom and occasional travel required.

Scope of work for the position.

- Issuing requested client certificates.
- Assist Account Executive and Account Managers with Review of client contract language documents and issue certificates that meet their requirements.
- Correspond with underwriters if client's current insurance does not meet the requirements of client contracts and work with UW's and Account Executive to broker solutions.
- Assist Account Executive and Account Manager with ordering endorsements, checking for accuracy and delivering to clients
- Setting up clients on the agency portal "CSR-24".
- Order Loss runs for renewals.
- Pull policy and endorsements from online carrier portals. Update EPIC activity.
- Pull policy forms of Additional Insured, Primary and Non-contributory, per project aggregate, 30 Day Notice of Cancellation from policies. File in "Forms Folder" and upload into CSR24 per client and attach to certificate template.
- Check and Deliver client policies with the use of Applied EPIC policy check system.
- Assist owner and Office Administrative Manager with licensing renewals-as needed.
- Assist with marketing on new business.
- Assist the agency with compliance with Surplus Lines filings.
- Assist with Special projects.
- Assist with various miscellaneous tasks in support of the team and insured clients as needed.

Requirements and Office Details:

- 3 Prior experience with a P&C commercial insurance broker.
- Currently licensed in State of residence as a P&C agent / broker.
- Experience with Applied System EPIC preferred.
- Detail oriented.
- Strong ability to communicate with team members and others on the VOCO2 team to while working from a home office environment.
- Ability to work remotely.