DAVID ROBERTS &PARTNERS GROUP

A bms. Group company

Commercial Account Handler, Birmingham (hybrid)

About DR&P

David Roberts and Partners was formed in 1977. Founded in Ormskirk, before moving to Southport, the organisation has now grown into a family of independent insurance brokers. With businesses spanning the UK and Europe. We have a team of over 550 dedicated colleagues, we place over >£630m premium worldwide with direct access to Lloyd's of London and other specialist international markets. While our businesses operate at a local level, the Group's infrastructure empowers us to compete with and win against the multinational brokers. The objective is always to provide the best possible service and protection for our clients.

Following a sustained period of growth, where DR&P Group has acquired multiple insurance business and is continuing to grow both organically and through acquisition, the group is now embarking upon the next chapter following our acquisition by BMS Group.

About BMS Group

BMS is a dynamic, independent, global broker established in 1980, delivering specialist insurance, reinsurance, and capital markets advisory services. We are a global brand with offices located across the US, Canada, Latin America, Australia, Europe and Asia with both a strong, local focus and understanding of market needs.

Our teams are respected globally for their specialist market knowledge, intelligent analysis and insight. Our people strive to be 'the best in class' and with an innovative approach and their entrepreneurial thinking, our clients truly benefit from better solutions to policy development and placement.

Being independent makes a key difference to our clients, giving our brokers the freedom to deliver the best solutions, tailored to meet their business needs. Coupled with our collaborative team approach, single platform worldwide and renowned personal service, we are the independent broker of choice.

Summary of position

The Insurance Account Handler provides day-to-day support to clients and Account Executives by managing insurance policies throughout their lifecycle. The role focuses on delivering high-quality customer service, ensuring accuracy in policy administration, and maintaining strong relationships with insurers and clients.

We offer a vibrant, fast paced environment with ample opportunity for professional and personal development.

Key responsibilities & accountabilities

- Act as a primary point of contact for clients, handling enquiries promptly and professionally
- Manage the administration of new business, renewals, mid-term adjustments, and cancellations
- Prepare insurance documentation including schedules, endorsements, certificates, and invoices
- Liaise with insurers and underwriters to obtain quotations, negotiate terms, and confirm cover
- Ensure all client and policy records are accurate and compliant with regulatory requirements
- Support Account Executives with renewal presentations and insurer negotiations
- Identify opportunities to cross-sell or up-sell products where appropriate
- Handle client queries and issues, escalating complex cases when required
- Maintain excellent knowledge of products, insurers, and market developments
- Ensure adherence to FCA regulations, Treating Customers Fairly (TCF), and company procedures

What we're looking for

Essential

- Previous experience in an insurance broking or underwriting environment
- Strong organisational skills with excellent attention to detail
- Confident written and verbal communication skills
- Ability to manage multiple tasks and work to deadlines
- Customer-focused approach with a professional manner

Desirable

- Experience in [Commercial / SME / Personal Lines – specify as relevant]
- Knowledge of FCA regulations and compliance requirements
- Familiarity with insurance systems and Microsoft Office applications

Qualifications

- GCSEs (or equivalent) including English and Maths
- Cert CII or working towards professional insurance qualifications (desirable but not essential)

Personal Attributes

- Proactive and reliable
- Strong team player
- Ability to build and maintain strong working relationships
- Calm and professional under pressure

What's in it for me?

- A highly ambitious and supportive team that works collaboratively to achieve your personal and professional goals whilst being a significant contributor to the overall success of the organisation
- 25 days holiday+ 1 day birthday leave (+8 recognised public and bank holidays) & option to purchase up to an additional 5 days holiday
- Company Pension Scheme
- Enhanced family leave (Maternity, Paternity, Adoption / Surrogacy)
- Family Support Benefits (Bubble care & New Baby gifts)
- Life Cover
- Medicash
- Income Protection
- Access to Cycle to Work Scheme

Through our Diversity, Equity and Inclusion (DEi) vision, we are committed to 'building a culture of belonging for all, valuing diverse perspectives and embracing authenticity.' As such, we have created our 'BMS Together' programme, with dedicated training, collaborative committees and intentional partnerships. In support of our ESG vision, we offer two additional paid days each year to take part in charitable work.

Please let our team know if you require any adjustments to support you through the application process.