

Surety & Commercial Account Manager

Ottawa, Canada (hybrid)

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 Commercial Account Manager will be responsible to deliver the strategic vision of the brokerage through the implementation and management of sound operational practices and giving excellent customer service while upholding high service standards.

Primarily responsible for the management and servicing of commercial clients, retention of renewal business, supporting of new business while working with the collaboration of an Account Executive.

Key Responsibilities & Accountabilities

- Service Construction and Commercial Realty Book of Business
- Ensure Account Executive are kept abreast of any potential issues or concerns related to a client or prospect
- Coordinate and communicate with Account Executive to develop a strategy for renewals and new business

- Analyze client coverage, exposures and loss experience to determine risk requirements and any gaps in coverage and communicate with the Account Executive and client accordingly.
- Respond to client requests and inquiries in a timely and professional manner
- Ensure broker management system is kept up to date by attaching all correspondence and communications, populating vehicle schedules, realty schedules, mailing addresses, client contact information, named insured's and setting up new policies etc.
- Request and process endorsements and review for accuracy
- Assist Account Executive with new business by preparing and processing new business including submissions, applications, proposals, comparison charts, spreadsheets, binders, certificates of insurance, liability slips, invoicing, preparing premium finance contracts, client letters, letters of authorizations
- Prepare and process renewal business including remarketing submissions, proposals, presentations, comparison spreadsheets, binders, summaries, and certificates of insurance.
- Keep Abeyances up to date, follow up on endorsements, statement of values, outstanding information, applications as required
- Periodic in-person and virtual meetings with clients, insurance companies and colleagues
- Process cancellations and requesting refund cheques
- Gather information requested by the underwriters for new and renewal business and providing guidance and assistance in the completion of applications as necessary (auto applications)
- Negotiate and secure the most appropriate coverage and premium based upon client needs and availability in the marketplace for both new and renewal business.
- Ensure the quality and accuracy of insurance policies/ endorsements received from insurance companies
- Report new claims and follow through to make sure everything is being handled appropriately to the client's satisfaction (in conjunction with Account Executive) which may include follow-ups with the Adjusters
- Build and maintain excellent relationships with insurance company underwriters, MGA's, lawyers etc.
- Ensure that the Continued Education Hours for RIBO are up to date for each term
- Keep abreast of new products or offerings by insurance companies

- Contribute to team success by consistently leveraging knowledge and sharing best practices
- Working collaboratively with the commercial team with a focus on delivering the strategic goals/ vision of the brokerage
- Special projects as may arise or assigned by management
- Handle all Surety deployment – review tender, negotiate with Insurance Companies, prepare Bid Bonds, Finals Bonds, Transact, Renewal preparations and when required; contact tender holders to confirm requests.

What we're looking for

- Client facing & customer focused with excellent interpersonal & written communication skills.
- Ability to perform effectively to tight deadlines with good personal organisation & time management skills.
- Anticipates problems in advance & makes contingencies
- Excellent attention to detail & ability to plan meticulously.
- Personally demonstrate the five BMS values and ensure that team members are aligned with these:
 - We put clients first
 - We work as one
 - We find a way
 - We sweat the details
 - We take ownership

What's in it for me?

- Competitive compensation package, including comprehensive medical and dental benefits, generous vacation allowance, competitive salary, and opportunities for employer-sponsored training and education
- Job Type: Full-time, Permanent
- Pay: \$110,000 per annum
- Schedule: Monday to Friday
- Work Location: Ottawa, Canada (hybrid)
- Job Type: Full-time

BMS Group Ltd

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Through our Diversity, Equality 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.

BMS offers flexible and hybrid working policies and we're happy to discuss options with you upon application. Please let our team know if you require any adjustments to support you through the application process.

To apply to this opportunity, please forward your CV and any supporting documents to: joinus@bmsgroup.com