DAVID ROBERTS &PARTNERS GROUP

A bms. Group company

Senior Commercial Account Handler / Commercial Account Handler
Brentford, West London

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.

Umbrella Insurance Services (part of DR&P / BMS Group)

Umbrella Insurance Services is an established commercial insurance brokerage with a strong reputation for delivering personalised, professional insurance solutions to businesses across a wide range of sectors.

Our business has been built on long-standing client relationships, technical expertise and a commitment to exceptional service, with strengths particularly in Property, Construction and complex commercial risks.

As part of David Roberts & Partners (DR&P), a BMS Group company, we combine the personal service and entrepreneurial approach of a specialist brokerage with the resources, insurer relationships and market access of a leading international insurance group.

As we continue to grow and develop our team, we are looking to appoint an experienced Commercial Account Handler or Senior Commercial Account Handler.

Summary of position

This is an excellent opportunity for an experienced commercial insurance professional to take on a key role within an established and growing commercial brokerage.
You'll work closely with a Client Director, playing an important part in the servicing and management and development of a substantial portfolio of commercial insurance clients.
The portfolio includes a diverse range of established businesses, larger commercial accounts and complex risks, particularly within the Property and Construction sectors.
The role offers considerable variety, responsibility and the opportunity to work closely with senior leadership, with scope to take greater ownership of the portfolio as the branch continues to evolve.
We are looking for someone who is technically capable, commercially aware, well-organised and confident in managing insurer and client relationships.

Key responsibilities & accountabilities

Portfolio Management & Client Service

- Manage a book of commercial clients
- Work closely with the Client Director to manage and service a substantial portfolio of commercial insurance clients
- Take responsibility for the day-to-day handling of allocated accounts, including larger and more complex commercial risks
- Manage the renewal process, ensuring timely preparation, market engagement negotiations and delivery of renewal terms
- Build and maintain strong working relationships with clients, insurers and other stakeholders
- Identify changes in clients' risk profiles and ensure appropriate insurance solutions are considered
- Maintain high standards of client service, responsiveness and technical accuracy

Technical Broking & Placement

- Prepare detailed market submissions and renewal presentations for both standard and complex commercial risks
- Obtain and negotiate competitive quotations and appropriate policy terms with insurers
- Review policy wordings, endorsements exclusions and coverage arrangements
- Handle a broad range of commercial insurance classes, including Property Owners, Commercial Combined, Contractors All Risks, Liability and Professional Indemnity
- Assist with the placement and servicing of larger, more technically demanding commercials accounts
- Work with the wider DR&P Group and specialist markets where additional placement expertise is required

Team Collaboration & Development

- Work collaboratively with the Client Director and team members to ensure the effective management of the portfolio
- Assist with coordinating workflow, renewal schedules and servicing priorities
- Provide guidance and technical support to other team members where appropriate
- Support the integration and development of junior members as the team expands
- Contribute to improvements in operational efficiency, service delivery and client retention
- Take increasing ownership of portfolio management as the team expands

What we're looking for

Essential Skills and Experience

- Previous experience in commercial insurance broking or account handling
- Strong understanding of commercial insurance products, policy coverage and insurer requirements
- Experience managing commercial renewals and negotiating with insurers
- Ability to handle complex accounts and manage multiple priorities effectively
- Excellent communication, organizational and relationship management skills
- Strong attention to detail and commitment to delivering exceptional client service
- A proactive, accountable and collaborative approach

Desirable Skills and Experience

- Experience handling larger commercial clients and more complex risks
- Knowledge of Property, Construction and associated commercial insurance classes
- Experience using Acturis
- Cert CII, Dip CII or working toward professional qualification
- Experience supporting or mentoring junior colleagues

Career Development

This position offers an opportunity to develop within an established and ambitious commercial insurance team.

The successful candidate will have the opportunity to assume greater responsibility for the day-to-day management of the client portfolio, supported by an expanding team.

For the right individual, this provides a genuine opportunity for professional development, increased autonomy and progression within the wider DR&P Group.

What's in it for me?

- A highly ambitious 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)
- Company Pension Scheme
- Company Social Events
- Discretionary annual bonus linked to the business hitting KPIs
- Group Income Protection
- Medicash Cash Plan
- Help@hand

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.

David Roberts & Partners (Insurance Brokers) Ltd
Southport Business Park, Wight Moss Way, Southport, PR8 4HQ drpinsurance.com I info@drpinsurance.com I 01704 508400
Authorised and regulated by the Financial Conduct Authority. Firm reference number: 143840 Registered in England & Wales Company No. 1329408.

BMS Group Ltd
One America Square, London, EC3N 2LS
Switchboard: +44 (0)20 7480 7288 Fax: +44 (0)20 7488 9837 www.bmsgroup.com Registered in England 1479949 BMS Group Ltd is authorised and regulated by the Financial Conduct Authority. Firm Reference Number 309686