

KATHLEEN M SCOFIELD

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615 Bailey Street

Chittenango, NY 13037

PROFESSIONAL HISTORY

Personal Lines Account Manager

Delmonico Insurance Agency

906 Spencer St., Syracuse, NY 13204

02/2002 – 01/2017

- Support agency sales efforts by developing complete submissions on new and renewal business and obtaining quotes in conjunction with agency marketing procedures.
- Achieve agency account retention goals through proactive account rounding and up-selling of limits and coverage.
- Perform annual review and risk exposure analysis of renewal policies for proper coverage, incorporating information obtained from client and/or producer.
- Maintain client files and ensure proper documentation by processing all policies, endorsement changes, invoices, binders, certificates of insurance, documentation, and activities, ensuring strict adherence to agency procedures and within finite deadlines.
- Maintain control of renewal expiration lists, binders, audits, and aged-receivables following agency guidelines.
- Respond to client inquiries (ex. in-person, phone, incoming e-mail, mail) and company requests in accordance with agency guidelines.
- Review all items to be processed, to ensure items were received as ordered.
- Participate in any special projects at management's request.
- Sets priorities and manages work flow to ensure efficient, timely and accurate processing of transactions and other responsibilities.
- Maintains a cordial and effective relationship with clients, coworkers, carriers, vendors and other business contacts.
- Participate in compliance courses for insurance/sales skills. Maintain current knowledge of underwriting requirements of carriers. Keep current with industry trends by reading appropriate journals and company bulletins.
- Interacts with others effectively by utilizing good communications skills, cooperating purposefully and providing information and guidance, as needed, to achieve the business goals of the agency.

Control Unit Personal Lines

General Accident Insurance/One Beacon Insurance

973 James St., Syracuse, NY 13203

01/1989 – 02/2002

- Responsible for policy processing, information accuracy and customer satisfaction.
- Support management by preparing correspondence, scheduling appointments, and coordinating detailed status reports for analysis.
- Liaison between management and agents to ensure proper licensing status, coordinate Workers Compensation policies, policy packages and endorsements.
- Administrative duties encompassing: quotes, policy additions, cancellations, reinstatement's, renewals, opening new customer accounts, data entry, transcription, typing and filing.
- Support staff team ordering office supplies, forms and switchboard coverage.

EDUCATION AND LICENSES

- High School Diploma – Morrisville, Jr. Sr. High, concentration in Business Administration.
- State of New York Department of Financial Services, Property and Casualty Personal Lines Insurance Brokers license – BR-1004418.
- Maintain Brokers license by attending 15 hours of continuing education every 2 years.