



# Account Service Representative

## Copic Job Description

### JOB OVERVIEW

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|---------------------|--------------------------------|
| JOB TITLE           | Account Service Representative |
| DEPARTMENT          | Copic Financial                |
| FLSA CLASSIFICATION | Non-exempt                     |
| REPORTS TO          | Director, Copic Financial      |

### JOB SUMMARY

The Account Service Representative supports Producer and Account Manager in delivering high-quality client service while developing the skills needed to manage an assigned **book of business**. This role combines administrative support, policy servicing, and client interaction, with increasing responsibility for day-to-day account ownership.

### KEY RESPONSIBILITIES

#### ➤ Accounts & Book of Business Support

Percent of Time: 40%

- Support the servicing of an assigned **book of business**, with gradual exposure to direct account ownership. Act as a **point of contact** for clients, ensuring timely and professional communication. Assist with renewals, coverage changes, and account reviews. Build relationships with clients to support retention and long-term growth. Partner with Account Manager and Producer to execute coverage strategies

#### ➤ Client Service & Policy Administration

Percent of Time: 30%

- Respond to client inquiries, carrier requests, and internal team needs in a timely manner. Issue Certificates of Insurance, Evidence of Property, and related documentation. Process endorsements, audits, cancellations, reinstatements, and policy changes. Review new and renewal policies for accuracy and completeness. Prepare insurance summaries, invoices, and other client-facing materials. Order loss runs, MVRs, and underwriting documentation as needed.

#### ➤ Administrative Support & Data Management

Percent of Time: 20%

- Maintain accurate client and policy data in agency management systems (EPIC or equivalent). Document all client interactions and policy activity thoroughly. Manage task lists and suspense items to ensure deadlines are met. Provide general administrative and operational support to the account team

**KEY RESPONSIBILITIES CONTINUED...**

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**➤ Professional Development & Compliance**

Percent of Time: 10%

- Maintain compliance with agency procedures to minimize errors and omissions exposure. Participate in training and development opportunities to build technical and client management skills. Maintain Property & Casualty License and other certifications as needed. Stay informed on industry trends, products, and carrier requirements.

**REQUIRED QUALIFICATIONS & SKILLS**

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- High School Diploma
- 3-5 years of insurance experience with a focus on client/customer service
- Current Property & Casualty License
- Strong organizational, administrative, and multitasking skills
- Excellent communication and teamwork skills
- Excellent customer service skills and mindset
- Proficiency in Microsoft Office (Outlook, Word, Excel)
- Detail-oriented with strong accuracy and follow-through
- Willingness to learn, grow, and adapt with the business

**DESIRED QUALIFICATIONS & SKILLS**

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- Experience with EPIC or other agency management systems
- Associate's or Bachelor's degree

**WORKING CONDITIONS**

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- Typical Office Environment
- Hybrid Schedule. Office located in Denver, Colorado
- Community Day and In-person Team Meetings (1-2 per month, Denver, Attendance required)
- Schedule
  - Full-Time, 40 hours per week, long or unusual hours as needed, sometimes on short notice
  - Business Hours: 8am-5pm



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### **About Copic**

*Copic's mission is to improve medicine in the communities we serve. We strive to be the premier diversified service organization providing professional liability insurance and other needs of the health care community through advocacy, innovation, and the commitment and dedication of our employees.*

*We offer competitive wages, a comprehensive and highly sought-after benefits package, and a great work environment with fun, friendly people who truly enjoy their work. Hiring range for this position is \$49,137.40/annually to \$61,421.75/annually.*

**Disclaimer:** *This is not meant to be comprehensive. Job duties and/or qualifications are subject to change depending on business need.*