

# Job Description

<p><b>Job Title:</b></p> <p><b>Reports to:</b></p> <p><b>Location:</b></p>	<p><b>Broker Back-up</b></p> <p><b>Divisional Operations Director</b></p> <p><b>Political Risk &amp; Trade Credit</b></p>
<p><b>Purpose of the role:</b></p>	<p>To support Broking staff with day-to-day relationships with Underwriters and Clients and the other RFIB Divisions.</p>
<p><b>Key responsibilities</b></p>	<ol style="list-style-type: none"> <li><b>1. Broker Support:</b> <ol style="list-style-type: none"> <li>1.1. To support the Senior Brokers in maintaining positive client relationships.</li> <li>1.2. To provide accurate and effective support to the Director and the team.</li> <li>1.3. Assist with the development of new business and the existing portfolio of clients.</li> <li>1.4. Contribute to the analysis of client data for presentation to (Re)Insurers.</li> <li>1.5. Monitor the progress of placement to ensure compliance with Group and FCA procedures and requirements.</li> </ol> </li> <li><b>2. Create Technical Documentation:</b> <ol style="list-style-type: none"> <li>2.1. Liaise with Brokers and/or Clients and prepare and populate an MRC with appropriate information.</li> <li>2.2. Prepare an MRC and supporting documentation in accordance with templates and MRC requirements using Brokasure.</li> <li>2.3. To ensure accurate completion of Brokasure data fields.</li> <li>2.4. Work with IBA to monitor and chase premium settlement.</li> <li>2.5. Oversee and approve client documentation prior to obtaining authorised signatories.</li> <li>2.6. Prepare Evidence of Cover documentation for signature.</li> <li>2.7. Prepare Debit Notes at same time as Evidence of Cover documentation as required.</li> </ol> </li> <li><b>3. Record Keeping:</b> <ol style="list-style-type: none"> <li>3.1. Use appropriate IT systems to maintain accurate records, e.g. Brokasure.</li> <li>3.2. Monitor Subjectivities, Premium Payment Conditions, etc. in respect of accounting related matters.</li> <li>3.3. Maintain Client Technical files and keep electronic filing up to date, including archiving as required.</li> <li>3.4. General office duties, e.g. filing, producing standard covering letters etc.</li> </ol> </li> <li><b>4. Liaise with Clients and External Parties:</b> <ol style="list-style-type: none"> <li>4.1. Participate in the explanation of the scope of cover and the terms and conditions of the policy to clients as appropriate.</li> <li>4.2. Negotiate and liaise with underwriters in placing risks as required.</li> <li>4.3. Service and maintain ongoing relationships.</li> </ol> </li> </ol>

	<p><b>5. Compliance:</b></p> <p>5.1. Adherence to Group Policies and Procedures.</p> <p><b>6. Develop Self:</b></p> <p>6.1. Show initiative to identify and solve problems, or to alert management.  6.2. To develop awareness of other RFIB Divisions and business classes.  6.3. To develop knowledge of current market practices and ethics, and to keep abreast with any changes and developments.  6.4. Research topics, collate data and produce documents and reports on own initiative to meet business requirements.  6.5. Contribute to Professional Development Plan (PDP) and identify training needs.  6.6. Undertake appropriate learning and Continuous Professional Development (CPD) as required for current/future job roles.  6.7. Maintain awareness of relevant external and internal regulatory developments, current market practice and initiatives to ensure opportunities and threats are acted upon.</p>
<p><b>Qualifications and experience:</b></p>	<p><b>Education:</b></p> <ul style="list-style-type: none"> <li>• Good standard of education, Degree level desirable but not essential.</li> <li>• Basic CII qualifications (such as Certificate) desirable.</li> </ul> <p><b>Knowledge of:</b></p> <ul style="list-style-type: none"> <li>• Broad range of IT systems, e.g. Microsoft Office and specific industry systems such as Crystal, Brokasure and Lloyd's QA tool.</li> <li>• General knowledge of (Re)Insurance markets and the processes of a London Market (Re)Insurance Broker.</li> </ul> <p><b>Key Competencies:</b></p> <ul style="list-style-type: none"> <li>• Managing effective and constructive working relationships.</li> <li>• Organising and managing workflow.</li> <li>• Keeping accurate and up-to-date records.</li> <li>• Use of IT systems.</li> <li>• Clear written and verbal communication.</li> <li>• Taking initiative to maintain and build client relationships.</li> </ul>
<p>Agreed by (Employee)</p>	<p>Agreed by (Line Manager)</p>
<p>Signed</p>	<p>Signed</p>
<p>Date</p>	<p>Date</p>

❖ The duties and responsibilities above are not a definitive list and additional responsibilities may be included within your current role. The job holder is also expected to accept any reasonable alterations and/or additional duties that may from time to time be necessary.