



Assistant Account Manager

Copic Job Description

JOB OVERVIEW	
JOB TITLE	Assistant Account Manager
DEPARTMENT	Copic Financial
FLSA CLASSIFICATION	Non-exempt
REPORTS TO	Director, Copic Financial

JOB SUMMARY

The Assistant Account Manager 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...

➤ Professional Development & Compliance

Percent of Time: 10%

- Maintain compliance with agency procedures to minimize errors and omissions exposure. Work toward obtaining and maintaining a Property & Casualty license (if not already licensed). Participate in training and development opportunities to build technical and client management skills. Stay informed on industry trends, products, and carrier requirements.

REQUIRED QUALIFICATIONS & SKILLS

- High School Diploma
- 1-2+ years of administrative, insurance, or customer service experience
- 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 and grow into a client-facing role
- Ability to obtain Property & Casualty License within 6 months of start date (if not already certified)

DESIRED QUALIFICATIONS & SKILLS

- Property & Casualty License
- Experience with EPIC or other agency management systems
- Associate's or Bachelor's degree

WORKING CONDITIONS

- 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



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 \$40,164.20/annually to \$50,205.25/annually.

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