



Renaissance Alliance Insurance Services, LLC

Job Title: Accounting Assistant
Department: Accounting & Billing
Reports To: Customer Service Manager of Accounting & Billing Services
FLSA Status: Exempt

SUMMARY

The Accounting Assistant will provide accounting needs, client services, and support in the basic areas of direct bill commission invoicing, recording of commissions, data management, and customer service within our growing Accounting Team.

EDUCATION and/or EXPERIENCE

- ◆ Associate's Degree or equivalent from two-year college required, Bachelor's Degree preferred
- ◆ 1-2 years insurance agency or accounting experience a plus, but not required
- ◆ Proficiency in Microsoft Excel Spreadsheet and Microsoft Word Processing Software

ESSENTIAL DUTIES AND RESPONSIBILITIES include the following. Other duties may be assigned.

Responsibilities

- ◆ Delivers excellent customer service to our member agents, outside carriers, and vendors
- ◆ Processes and records commission payments in multiple data management systems
- ◆ Obtains and prepares commission statements for our invoicing team
- ◆ Sets up documents for electronic imaging and scans them to the appropriate imaging files
- ◆ Analyzes and prepares payments for our member agents as required
- ◆ Processes and prepares journal entries as needed
- ◆ Assists with Accounts Payables as required
- ◆ Assists with Accounts Receivables as required
- ◆ Collaborates with staff to meet target dates and deadlines
- ◆ Creates and updates related policies and procedures as required
- ◆ Provides primary and secondary backup in various tasks for other accounting team members as required
- ◆ Assists with related special projects, as required
- ◆ Other duties may be assigned

SUPERVISORY RESPONSIBILITIES – None



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COMPETENCIES

To perform this job successfully, an individual must be able to proficiently perform each essential duty.

- ◆ **Customer Service** - Manages difficult or emotional customer situations; Responds promptly to customer needs; Solicits customer feedback to improve service; Responds to requests for service and assistance; Meets commitments
- ◆ **Adaptability** - Adapts well to changes in the work environment; Manages competing demands; Changes approach or method to best fit situation; Able to deal with change, delays, or unexpected events; Must be able to react to project adjustments and alterations promptly and efficiently
- ◆ **Written Communication Skills** - Strong writing skills; Writes clearly and informatively; Edits work for spelling and grammar; Ability to compose expressive documents, reports, and letters utilizing proper grammar, punctuation, and appropriate writing styles.
- ◆ **Interpersonal Skills** – Focuses on solving problems, not looking for who is responsible; Maintains confidentiality; Listens to others without interrupting; Remains open to others' ideas; Motivates and encourages others to achieve success, grow, and reach beyond their capabilities; Instills confidence in self and others; Displays emotional intelligence during times of conflict and/or pressurized work environments; Balances professional and personal life stresses to ensure consistent work; Sets high personal standards
- ◆ **Teamwork** – Balances team and individual responsibilities; Exhibits objectivity and openness to others' views; Gives and welcomes feedback; Contributes to building a positive team spirit; Demonstrates a positive attitude; Puts success of team above own interest; Able to build moral and group commitments to goals and objectives; Supports everyone's efforts to succeed
- ◆ **Process Quality** - Demonstrates accuracy and thoroughness; Looks for ways to improve and promote quality; Provides and applies feedback to improve performance; Monitors own work to ensure quality; Meets productivity standards; Completes work in timely manner; Strives to increase productivity; Prioritizes and plans work activities; Uses time efficiently; Sets goals and objectives; Develops realistic action plans; Anticipates potential problems and takes steps to resolve
- ◆ **Problem Solving** - Identifies and resolves problems in a timely manner; Gathers and analyzes information skillfully; Develops alternative solutions; Works well alone and in group problem solving situations
- ◆ **Motivation** - Sets and achieves challenging goals; demonstrates persistence and overcomes obstacles; measures self against standard of excellence; takes calculated risks to accomplish goals