



## Senior Account Manager

### General Responsibilities and Duties:

**Summary: To oversee a team of staff that manages a diverse portfolio of captive insurance companies, with preparation of timely financial reporting, regulatory filing requirements, premium taxes and liaison with auditors, actuaries and other third party providers while providing excellent client servicing.**

### Duties and Responsibilities

- Oversee the preparation and maintenance of clients' corporate and accounting records
- Coordinate client acceptance, insurance license applications and KYC sign-off
- Interpret new captive legislation requirements per domicile
- Efficiently integrate new captive legislation into the workflow process with educating staff on procedures
- Prepare and/or review insurance documentation
- Establish and monitor bank and investment accounts
- Oversee the preparation and maintenance of clients' quarterly and year-end financial reports
- Coordinate clients' annual audits and prepare audit packages to strict deadlines
- Liaise with clients' auditors, actuaries, bankers, investment managers and other third party service providers
- Liaise with insurance regulators, ensuring that clients are in compliance with domicile specific requirements
- Perform general client servicing
- Attend client board meetings in Charlotte and elsewhere as required
- Assist the Senior Management Team with new business inquiries, general compliance and regulatory issues and other projects as required
- Perform supervisory responsibilities in accordance with the organizations policies and applicable laws. Responsibilities include interviewing, hiring and training employees, planning, assigning and directing work, appraising performance, rewarding and disciplining employees, addressing complaints and resolving problems.

### **Qualifications and preferred Skills:**

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. An individual must be competent and capable, creative, have fun with a “can do” approach and act with integrity. The following requirements are representative of the knowledge and skills needed to succeed in this role:

- Strong leadership skills
- Exceptional oral, written and interpersonal communication skills
- Proficiency with Microsoft Office products
- Manager/Supervisory experience
- General ledger experience
- Strong organization skills
- Problem solver
- Relationship builder

### **Education/Experience**

- Bachelor’s Degree in accounting
- Certified Public Accountant or Chartered Accountant
- Experience with the following is preferred:
  - Captive insurance
  - Client service
  - Insurance accounting
  - Investment accounting
  - Regulatory reporting
  - QuickBooks
  - Treasury and corporate secretarial functions