

Position Overview/Summary (Basic purpose of the job): To follow up on life, annuity, disability and long-term care new business cases submitted by brokers. Act as liaison between the broker and carrier. To follow up and ensure applications move along in a timely fashion from the point of sale to the point of placement.

Principal Duties and Responsibilities (Essential Job Functions):

- Act as a new business liaison between brokers and 25+ life and annuity insurance companies.
- Confidently and accurately handle a minimum of 150 policy case load with thorough results
- Maintain department service standards: Follow up on cases every 3 days; return calls within 2 hours; respond to emails within 3 hours
- Assist brokers in person and over the phone with carrier forms and underwriting requirements
- Order and follow up on exams, APS's and other underwriting requirements as needed
- Keep cases accurately updated with current notes/requirements/documents
- Resolve case issues quickly and efficiently with minimal disruption to the broker or client; defer major case issues to NB Coordinator II or New Business Director for assistance
- Review, understand and stay apprised of all carrier underwriting guidelines and new business processing changes/procedures/deadlines
- Work closely with Contract & Licensing department to ensure a broker appointment is processed in coordination with the application
- Provide backup support to Processing Coordinator and enter applications into database as needed
- Understand and assist brokers and directors with I-Go or other drop ticket processes
- Run Term quotes; understand how to read UL illustrations. Seek guidance from New Business Director or Internal Sales Marketer for quotes/illustrations on cases approved other-than-applied-for
- Understand carrier e-policy delivery systems
- Thoroughly review policies at time of issue and forward to broker promptly
- Process delivery requirements promptly so commissions can be paid faster
- Participate in monthly carrier webinars
- Occasional travel to carriers (0-1 time a year)
- Other projects as assigned by New Business Director or other upper management

Misc. Job Duties (Non-essential Job Functions):

- Thinking ahead and heading off potential problems
- Developing and maintaining close professional relationships with carrier Underwriting and New Business departments to ensure faster turnaround times Maintaining a professional attitude and dressing for success
- Maintain clean, organized workspace
- Ability to navigate the internet or carrier website for information
- Openly communicating with team members and sharing new carrier information
- Willingness to consistently learn, grow and accept changes

Skills/Requirements/Qualifications (To perform the job):

- H.S. Diploma or GED
- 1+Yr Customer Service experience
- 1+ Yrs brokerage agency or life insurance new business experience
- Knowledge and understanding of life/annuity insurance terminology/processes
- Desire to work in the insurance brokerage field
- Excellent organizational and deductive reasoning skills
- Fast learner with exceptional attention to detail

- Excellent and accurate typing skills
- Dependable, accountable and patient
- Proficient knowledge of Microsoft Office: Adobe, Word, Outlook and Excel
- Ability to effectively communicate both verbally and written
- Efficient time management and organizational skills to include the ability to efficiently multi-task under time constraints
- Team player with a positive attitude and willingness to help others
- Working overtime as needed