



Elite Marketing Group

An Insurance Designers member since 1986

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Employee Job Description

Name:	
Job Title:	New Business Processing Coordinator
Department:	Administrative Staff-New Business (Houston)
Classification:	Full-Time / Non-Exempt
Reports To:	Director, Operations/New Business

Position Overview/Summary (Basic purpose of the job): To receive and process new business applications daily in a timely and effective manner with minimal errors. To support marketing directors with new agent on-boarding, as well as, support New Business Coordinators, as needed.

Principal Duties and Responsibilities (Essential Job Functions):

- * Understand basic life insurance and annuity terminology
- * Understand agent appointment process, as well as, agency contracting and hierarchy levels
- * Receive life and annuity applications by mail, email or fax
- * Process life, annuity, DI, LTC new business applications
- * Thoroughly review applications to ensure in-good-order processing
- * Call or email agents immediately for any missing information (that prevents submission to carrier)
- * Process paper applications (formal/informal) by entering them in the Agency Management System, as well as, monitor E-apps and drop tickets in AMS.
- * Review carrier guidelines and order exams and medical records (APs) as needed
- * Scan applications and forms into Paper Clip (imaging) database
- * Submit applications and premium to various insurance companies by mail, email, fax or imaging
- * Work with third-party vendor to submit applications to carrier
- * Monitor third-party vendor application processing
- * Monitor New Business email Inbox hourly and forward emails accordingly
- * Maintain department service standards: Process up to 15 applications per day; applications received by 2pm are to be processed the same day. Return calls to agents/carriers within 1 hour; respond to emails with 1 hour. Inform supervisor when processing is delayed by 2 (or more) days
- * Communicate regularly and effectively with supervisor, internal staff, agents and carriers to ensure the application submission process is smooth and prompt
- * Run term quotes as needed; retrieve permanent illustrations from the shared drive or request them from the director or Internal Sales Marketer

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- * Stay apprised of carrier product deadlines/changes to ensure product deadlines are met, as well as, correct database entry and policy issue
- * Stay apprised of carrier underwriting guidelines and changes by maintaining underwriting folders up to date
- * Responsible for quarterly updates/revisions to Processing Coordinator manual
- * Backup Health Coordinator as needed by process and entering Health applications into system
- * Backup receptionist for lunch or on days off / kitchen clean up on rotation basis
- * Other projects as assigned by Director of Operations/New Business or other upper management

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

- * Fast learner with exceptional attention to details
- * Dependable, accountable and patient
- * Excellent organizational and deductive reasoning skills
- * Thinking ahead and heading off potential problems
- * Ability to navigate the internet or carrier website for information
- * Maintaining a clean, organized workspace
- * Openly and effectively communicate with team members by sharing all pertinent processing information
- * Willingness to consistently learn, grow and accept changes
- * Dedicated team player with a positive attitude and willingness to help others
- * Maintaining a positive, friendly, professional attitude and dressing for success

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

- * H.S. Diploma or GED
- * Knowledge and understanding of basic insurance/annuity terminology/processes
- * 1+ Yrs life insurance basics or insurance agency experience (preferred, but no required)
- * 1+Yrs Customer Service experience
- * Typing Skills: 45wpm accurately
- * Ability to communicate clearly and effectively both verbally and written
- * Proficient knowledge of Microsoft Office programs (Adobe, Word, Excel)
- * Efficient time management and organizational skills to include the ability to multi-task and remain focused under time constraints

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