

## IMPLEMENTATION & POLICY SERVICES SPECIALIST

**Position Description:** Responsible for management and coordination of all aspects of implementation of new business and on going policy service. Serve as the primary liaison with carriers, medical facilities, clients, and their advisors, to facilitate the medical and financial underwriting aspects of implementation as well as on going policy service.

### Responsibilities:

- Manage the implementation process, which is consistent with firm's mission to provide efficient, effective, and proactive service to clients. This will include:
  - Maintaining current knowledge of the various carriers' strengths, guidelines, and underwriting procedures
  - Keep Salesforce up to date on the status of all cases during the implementation process
- Develop advanced knowledge of underwriting procedures as well as carrier products and life insurance illustrations
- Act as a primary liaison with clients during the implementation process as well as for on going policy service
- Schedule medical examinations, order medical records, and screen medical data for assessment of risk
- Gather financial data from client or client's financial advisors to justify the amount of insurance at risk
- Prepare and review applications for accuracy
- Negotiate with carriers, as needed, to obtain the best possible underwriting
- Communicate with client on a regular basis regarding status of implementation
- Review policies for accuracy
- Prepare correspondence for transmittal of documents to clients
- Facilitate smooth transition of corporate clients from implementation to Account Management
- Work with clients on any on-going policy service requests, including processing policy changes (e.g. beneficiary, ownership, premium payments, etc.)
- Prepare annual client audits
- Assist with securities related compliance items for the office
- Participate as a team member in special projects
- Participate in industry meetings for the purpose of continuing education and/or obtaining industry designations

### Qualifications:

#### EDUCATION AND EXPERIENCE:

- Working knowledge of life insurance underwriting and life insurance concepts preferred
- Undergraduate degree preferred

#### SKILLS:

- High attention to detail
- Strong organizational skills
- Strong 'can do' attitude
- Strong verbal and written communication skills
- Ability to work autonomously and perform well under pressure
- Strong attention to detail with ability to organize, prioritize, and manage multiple tasks within set

deadlines

- Strong negotiation and decision-making skills
- Ability to deal with sensitive and confidential data
- Knowledge of underwriting concepts and life, disability, and long term care insurance products

Preferred

- Experience with Salesforce Preferred