



Employee Benefits Account Manager

Department: Molyneaux Insurance Employee Benefits

Reports to: Employee Benefits Supervisor

FLSA Status: Overtime Eligible

Purpose:

Responsible for the completion of all service and marketing activities for assigned Employee Benefit accounts in accordance with the objectives and procedures outlined for the department; as delegated by Account Executive, Client Service Executive, or Employee Benefits Supervisor, responsible for reporting the status of assigned tasks to Account Executive or Client Service Executive.

Fosters the positive functioning of the team.

Duties & Responsibilities:

- Assists with the marketing process, as delegated by the Account Executive, Client Service Executive, or Employee Benefits Supervisor, for all assigned prospects, new and renewal accounts; this process includes census gather, RFP preparation (Request for Proposal), carrier submission and follow up, analysis of carrier proposals and preparation of the sales proposal.
- Assists Account Executive or Client Service Executive in the review and correction of policies, agreements and amendments, as requested.
- Prepares sales proposal for assigned prospects, new and renewal accounts; ensuring accuracy on rates, provisions, etc.
- Prepares communication and enrollment materials for Employee meetings.
- Provides daily customer service to assigned clients, responding to inquiries promptly and professionally. Work with Account Executive or Client Service Executive for resolution of high-level service issues.
- Follows up in writing/email with final resolution and document file, as necessary.
- Maintains an overall awareness of each assigned client's programs and status of issues.
- Maintains status of work in databases for assigned accounts.
- Fosters positive professional relationships with assigned clients; maintains professional relationships with insurance carriers and vendors.
- Delegates projects such as proposals, census, and other projects to Account Coordinator for completion as needed.
- Reviews and corrects policies, agreements and amendments.
- Performs other specific duties as assigned.
- Pursues programs of personal & professional development as approved.

Job Specifications:

- Excellent oral and written communication skills.
- Excellent organizational multi-tasking and prioritizing skills, along with remaining flexible.
- Proficiency in performing arithmetic calculations including premiums and contributions.
- Ability to comprehend technical insurance policy and contract language.
- Ability to accomplish the described duties through the use of appropriate computer and general office equipment including proficiency with Microsoft Word, PowerPoint, Excel and agency management system.
- Excellent analytical skills including the ability to evaluate and compare health, life, disability and reinsurance policies and contracts.
- Individual Health Insurance, including Medicare and Medicare Prescription Drug plans experience is preferred.
- Exhibit excellent team building skills, cooperation and collaboration with assigned Account Executive, Client Service Executive, Employee Benefits Supervisor and fellow team members.

Education Requirements:

- College degree, professional designation or equivalent training and/or experience preferred.
- Ten+ years of independent agency and Employee Benefits experience.

Licensing and Certification Requirements:

- Obtains and maintains appropriate insurance agent's license within 60 days of hire.

Work Hours:

- Full time (37.5 hours per week).
- Travel may be required to attend training sessions.