



Title: Insurance Account Manager

Location: Overland Park, KS

Job Description: **JOB SUMMARY**

The Insurance Account Manager will work with the Wealth Managers and directly with clients to implement insurance recommendations for individual life, disability or Long-Term Care Insurance. They will also assist with policy service requests.

We do not accept resume submissions from third-party recruiters or staffing agencies. Please contact our recruiting team directly.

JOB DUTIES

- Assist Wealth Managers with implementing dashboard insurance recommendations
- Assist new or existing clients with applying for individual life, DI or LTC insurance
- Research which life, DI and/or LTC insurance carrier is best for client (i.e. lowest premium, best benefits)
- Request/prepare insurance proposals based on client needs or recommendations
- Complete life, DI and/or LTC applications with the client
- Order medical requirements from Paramed Company as needed for each case
- Send/follow up on applications or forms sent to client for signature
- Submit/track applications or forms to insurance carrier
- Monitor insurance applications through the underwriting process to ensure applications are issued timely
- Prepare/deliver issued policies to the client
- Track/follow up/submit policy delivery requirements
- Communicate with both clients and Wealth Managers as needed
- Scan applications/policies/correspondence to manage accuracy of the CRM and Z Drive client files
- Assist with policy service requests (bene changes, bank changes, claims, service forms, information requests, agent of record letters, in force illustrations, etc.)
- Research/answer questions

REQUIRED EXPERIENCE / QUALIFICATIONS

- Life & Health licensed
- High-level multi-tasker
- Excellent writing and verbal communication skills
- Efficient, extremely detail oriented and accurate

PREFERRED EXPERIENCE / QUALIFICATIONS

- 1 – 2 years working with life insurance, disability insurance, and long-term care insurance

TECHNICAL SKILLS

- MS Office Proficiency/Windows 10 experience
- Knowledge of standard office equipment