

JOB DESCRIPTION**Job Title:** Account Assistant**Reports To:** SVP of Life & Financial Services**Department:** Financial Services Division**Status:** Exempt

SUMMARY/OBJECTIVE

The Account Assistant in the Financial Services Division provides administrative and account support to the Account Executive for the Division. This role is responsible for service of new and existing Clients while ensuring effective and timely completion of required tasks, correspondence, record keeping and meeting quality standards.

ESSENTIAL FUNCTIONS

- Provide support and respond to Client/Prospect inquiries and concerns
- Update applications and other Client information in the Agency Management System
- Create correspondence, reports, and other documents for new and prospective Clients
- Serve as a customer service liaison between Clients and the Financial Services Team
- Assist in sales process and service of Prospects and Clients
- Collect underwriting information, including medical history and financial information.
- Evaluate insurance policies for performance reviews through SmartOffice
- Work with Account Executive on selection of potential life insurance carriers and product
- Arrange medical exams through EMSA
- Prepare illustrations predicated on insurance company offers
- Review existing Life Clients and indicate if they are good candidates for life replacement policy
- Work with Financial Services Team to deliver insurance programs
- Keep informed of industry developments and continuing education by attending insurance carrier training meetings on new products, etc.

COMPETENCIES

- Technical Proficiency
- Operational Skills
- Personal & Interpersonal Relationships
- Delivering Results
- Organization Skills
- Time Management Skills

- Energy & Drive

QUALIFICATIONS/SKILLS

- Education: College degree preferred
- Life & Health Producer's License - Illinois
- Business and/or Life and Financial Services brokerage experience preferred
- Exceptional ability to work well with both internal and external constituents with a Premier Client-Centric mindset
- Demonstrated experience in working proactively, taking initiative and operating with minimal supervision
- Excellent analytical skills
- Excellent written and verbal communication skills
- Ability to meet deadlines and manage multiple priorities simultaneously in a fast-paced environment and work effectively under shifting priorities and pressure
- Provide Premier Client-Centric customer service to both internal and external constituents
- Proficient computer skills in Microsoft Office, experience in working with AMS360 or comparable agency management system preferred
- Competency with SmartOffice, preferred

OTHER DUTIES

Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities and activities may change at any time with or without notice.