



Position Title: Life and Health Insurance Assistant

Primary Function:

Provide assistance to producers in handling and processing of individual life and health insurance business.

Responsibilities:

1. Set up and maintain files in the client management system
2. Order exams and other tests as needed by the applicant
3. Gain an understanding of various underwriting requirements and carriers
4. Assist producers in tracking status on pending applications
5. Update carrier files as needed
6. Prepare materials for enrollments
7. Distribute invitations and marketing materials for seminars
8. Post commissions
9. Assist with a variety of tasks as determined by the department supervisor
10. Communicate effectively with clients as needed
11. Process claims paperwork
12. Organize client comparisons and proposals
13. Transfer documents to a paperless system

This person must be a self-starter, organized, and willing to perform tasks as needed for the Financial Services and Senior Solutions departments. Proficiency with Microsoft Office products is required as well as the ability to easily adapt to and understand new applications/programs.