

Job Title: Junior Life Insurance Case Manager /e-App Life Insurance Case Manager

Department: New Business

FLSA – Non-Exempt – (In office or Remote/Hybrid)

Reports to: Director of New Business (Teri Zupec)

Job Description:

The Producers Group is seeking a highly reliable and motivated team player for a Life Insurance Junior Case Manager. This individual will be responsible for case management of life insurance electronic applications and transactional cases as assigned in a customer-centric environment.

Duties and Responsibilities:

- Review and input new business applications to determine appropriate processing path
- Submit application to carrier
- Order and management of application requirements
- Negotiate with carrier for best offer
- Communicate case status and underwriting offer to agent
- Manage, Issue and Delivery of policies
- Document Agency Management System as defined.
- Keep current of carrier updates/changes and demonstrate understanding of Carrier and Carrier products.
- Attend department meetings.
- Communicate and coordinate with Contracts & Licensing, Commissions, Underwriting and other departments as needed
- Anticipate potential problems/issue and provide solutions to prevent or resolve

Desired Skills/Experience:

- Case Manager Assistant experience required, minimum of 6 months experience preferred.
- Thorough understanding of Life Insurance New Business processes and procedures
- Proven experience in handling high volume cases with quick turn-around
- Solid computer aptitude and utilization of the Agency Management System
- Excellent Customer Service skills.
- Possess a strong sense of urgency and ability to complete tasks timely/efficiently with a high degree of accuracy
- Effective communication with Internal and External Customers using various media (phone, e-mail, etc.)
- Excellent technical skills to handle a paperless environment
- Detail oriented, highly organized with the ability to prioritize workload
- Ability to work independently or in a team environment
- Demonstrated understanding of Carrier and Carrier products, and life insurance industry/products

For immediate consideration, please submit resume, cover letter and salary requirements to careers@thepg.com