

New Business Case Manager

Responsible for management and coordination of all aspects of implementation of new business and serve as a backup for ongoing policy service. Serve as the primary liaison with carriers, medical facilities, clients, and their advisors, to facilitate the medical and financial underwriting aspects of implementation.

Responsibilities

- Manage the implementation process, which is consistent with firm's mission to provide efficient, effective, and proactive service to clients. This will include:
 - Maintaining current knowledge of the various carriers' strengths, guidelines, and underwriting procedures
 - Keep Salesforce up to date on the status of all cases during the implementation process
- Develop advanced knowledge of underwriting procedures as well as carrier products and life insurance illustrations
- Act as a primary liaison with clients during the implementation process
- Schedule medical examinations, order medical records, and screen medical data for assessment of risk
- Gather financial data from client or client's financial advisors to justify the amount of insurance at risk
- Prepare and review applications for accuracy
- Negotiate with carriers, as needed, to obtain the best possible underwriting
- Communicate with client on a regular basis regarding status of implementation
- Review policies for accuracy
- Prepare correspondence for transmittal of documents to clients
- Facilitate smooth transition of corporate clients from implementation to Account Management
- Assist with securities related compliance items for the office
- Participate as a team member in special projects
- Participate in industry meetings for the purpose of continuing education and/or obtaining industry designations

Qualifications

Education and Experience

- Working knowledge of life insurance underwriting and life insurance concepts preferred
- Undergraduate degree preferred

Skills

- High attention to detail
- Strong organizational skills
- Strong 'can do' attitude
- Strong verbal and written communication skills
- Ability to work autonomously and perform well under pressure
- Strong attention to detail with ability to organize, prioritize, and manage multiple tasks within set deadlines
- Strong negotiation and decision-making skills
- Ability to deal with sensitive and confidential data
- Knowledge of underwriting concepts and life, disability, and long-term care insurance products Preferred
- Experience with Salesforce Preferred

Mezrah Consulting Culture

- **Fun:** At the core of everything we do
- **Honesty:** Open and honest communication is paramount and valued
- **Integrity:** We stand behind our commitments to our employees and clients alike
- **Innovation:** We embrace change and are always thinking with a vision toward the future, creating new strategies and simplifying complex ideas
- **Focus:** Growing business by growing our people