

POLICY SERVICES SPECIALIST

Responsible for management and coordination of all aspects of implementation of new business and 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 as well as on going policy service

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 as well as for ongoing policy service
- 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
- Work with clients on any on-going policy service requests, including processing policy changes (e.g., beneficiary, ownership, premium payments, etc.)
- Prepare annual client audits
- 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