HM Benefits

Job Description

Job Title: Account Manager

Department: Employee Benefits

Reports to: Team Leader

Status of Position: Exempt

Essential Duties and Responsibilities

- Assist Account Executive in servicing client consulting/insurance coverage projects.
- Build relationships with clients and have the ability to answer insurance service & administration questions. (billing, coverage, compliance) and solve problems.
- Responsible for creating and interpreting new and renewal RFP's, marketing documents, and spreadsheets.
- Responsible for creating both new and renewal presentation documents and spreadsheets.
- Capable of interpreting SPD's , Plan Documents, for compliance and accuracy.
- Perform tasks within the Agency customer management system, i.e., Brokerage Builder/Zywave, etc.
- Request claims reports for renewal submissions and monthly client reports.
- Attend client meetings as needed.
- Perform client employee enrollment meetings.
- Create client paper and electronic files.
- Perform special projects as assigned.

Supervisory Responsibilities

Does this position include any supervisory responsibilities?
  No

Educational Requirements

High School   **College Graduate** Other **Missouri Life & Health License**

Work Experience

- What prior work experience is required for this position?

  At least **2-3** years of insurance experience in the employee benefit industry

Technical Skills

- Basic Knowledge of Employee Benefit Coverages.
- Proficient in Microsoft Word, Outlook, Excel and Powerpoint.
- Proficiency in Zywave or ability to learn this program.
- Proficiency in Adobe Acrobat-or ability to learn this program.
- Ability to manage multiple tasks.
- Good organization skills.
- Attention to accuracy and detail.

Physical Demands

- May require lifting packages up to 25 pounds

Travel Required

Yes

If yes, what percentage of time? **Up to 10% of time**.

Additional Requirements

- Excellent interpersonal skills and a pleasant disposition required at all times.
- Ability to work well with others in a fast paced environment.
- Team player.

Completed by: _____

HR Approval: _____

Employee: _____

Date: _____