



Job Description

Job Title: Account Executive

Department: Employee Benefits

Reports to: Team Leader

Status of Position: Exempt

Essential Duties and Responsibilities

- Maintains book of fee/commissioned revenue business.
- Responsible for all aspects of client project work with regards to medical and ancillary lines including renewal negotiations, marketing projects, pre-renewal forecasting analysis, claim projection analysis, full-insured and self-insured funding alternatives.
- Responsible for strategic planning, cost/benefit analysis and budget forecasting projects.
- Build relationships with assigned clients and give prompt attention to their requests. Be pro-active. Work with Producers to discuss the client's future insurance needs. Maintain appropriate business contact with the client.
- Attend and organize client meetings to discuss financial and services issues.
- Manage monthly client reporting package.
- Develop annual client plan.
- Conduct employee meetings for clients.
- Develop relationships with insurance carriers to gain marketplace awareness and obtain the most competitive costs for clients.
- Utilize Zywave to maintain client information and workflows
- Identify new trends and developments in the insurance marketplace.
- Assist Producers in pursuing new business opportunities with existing and new clients.
- Assist in the training and development of various employee benefit related products.
- Assist in the interface with new and current clients for service and related needs.
- Assist the accounting department in collecting premiums, when necessary.
- Special projects as assigned.

Supervisory Responsibilities

Does this position include any supervisory responsibilities?

Yes No

Educational Requirements

High School Associate Degree **College Graduate** Other **Brokers License**

Work Experience

- At least **5** years of experience in the employee benefit field.

Technical Skills

- Strong knowledge of Benefit insurance coverage.
- Proficiency 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.
- Knowledge of PowerPoint is a plus.
- Ability to manage client needs and multiple tasks.
- Good organization skills.
- Attention to accuracy and detail.

Physical Demands

- May require lifting packages up to 25 pounds

Travel Required

- **Yes** No
- If yes, what percentage of time? **Up to 25% of time**

Local travel will be necessary to meet the client needs and occasionally may be nationally.

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: _____