

# **Life Insurance Client Service Manager**

**Position Description:** Provide support in the delivery of effective life insurance policy and benefit plan administration for complex life insurance cases for estate planning and executive disability insurance plans.

## **Essential Duties and Responsibilities:**

- Manage Trust Owned Life Insurance policy portfolios for affluent clients
- Generate client life insurance annual review summaries for existing clients.
- Respond directly to clients on service related inquiries in a timely fashion.
- Provide periodic services, such as beneficiary and ownership changes, conversions, removal of riders, address changes, loans, premium administration, etc.
- Update client administrative database to reflect changes in client's insurance portfolio.
- Generate bi-monthly reports of service events requiring attention during subsequent one month and quarterly intervals.
- Send custom invoices and Crummey notification letters for trust owned insurance policies.
- Maintain system to track split-dollar life insurance policies for premiums, cash values, and death benefit splits.
- Provide support for multilife executive disability plans
- Conduct Guaranteed Standard Issue annual increases and coordinate with newly eligible participants.
- Update delivery manuals to reflect additions, deletions, and policy changes.
- Update system to track periodic and one-time services.
- Work with advisors to facilitate complex policy changes.
- Knowledge of executive disability insurance plans a plus.
- Participate as a team member in special projects.

## **Minimum Qualifications (Knowledge, Skills and Abilities)**

- Three years' experience in life and disability insurance policy administration or prior life insurance sales experience (no selling involved with this position)
- Life and Health Insurance License
- FINRA Series 6 and 63
- Life Insurance industry professional designations preferred
- Proficient in Microsoft Office and life insurance carrier illustration systems
- College degree preferred
- Keen attention to detail with ability to organize, prioritize, and manage multiple tasks within set deadlines
- Strong verbal and written communication skills
- Ability to work autonomously and perform well under pressure with affluent clients.
- Collaborative attitude to work with others in a team environment.

**Benefits Offered** - Paid Medical, Dental, 401K with 4% match plus Profit Sharing  
**Employment Type** - Full-Time