Life Insurance Client Service Administrator

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 multi-life 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.
- Run in force illustrations for existing clients to compare to as sold illustrations
- Update system to track periodic and one-time services.
- Work with advisors to facilitate complex policy changes.
- Basic 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, free parking
Employment Type - Full-Time, in our office in Midtown Charlotte

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