



Title: Risk Management Account Manager

Location: Leawood, KS

Job Description: **JOB SUMMARY**

The **Risk Management Account Manager** will work with the Wealth Managers and directly with clients to implement insurance recommendations for individual life, disability or Long Term Care Insurance. They will also assist with policy service requests.

JOB DUTIES

- Assist Wealth Managers with implementing dashboard insurance recommendations.
- Assist new or existing clients with applying for individual life, DI or LTC insurance.
- Research which life, DI and/or LTC insurance carrier is best for client (i.e. lowest premium, best benefits).
- Request/prepare insurance proposals based on client needs or recommendations.
- Complete life, DI and/or LTC applications with the client.
- Order medical requirements from Paramed Company as needed for each case.
- Send/follow up on applications or forms sent to client for signature.
- Submit/track applications or forms to insurance carrier.
- Monitor insurance applications through the underwriting process to ensure applications are issued timely.
- Prepare/deliver issued policies to the client.
- Track/follow up/submit policy delivery requirements.
- Communicate with both clients and Wealth Managers as needed.
- Scan applications/policies/correspondence to manage accuracy of the CRM and S Drive client files.
- Assist with policy service requests (bene changes, bank changes, claims, service forms, information requests, agent of record letters, in force illustrations, etc.).
- Research/answer questions.

REQUIRED EXPERIENCE / QUALIFICATIONS

- Life & Health licensed
- High-level multi-tasker
- Excellent writing and verbal communication skills
- Efficient, extremely detail oriented and accurate

PREFERRED EXPERIENCE / QUALIFICATIONS

- 1 – 2 years in working in the life insurance industry
- 1 -2 years in working in the disability insurance industry
- 1 -2 years in working in the long term care insurance industry

TECHNICAL SKILLS

- MS Office Proficiency/Windows 10 experience
- Knowledge of standard office equipment