Case Manager

(full-time, regular employment)

About AdvisorNet Financial

AdvisorNet Financial has been an innovative leader in the financial services industry for over 60 years. We provide the services and support independent financial advisors rely on to operate their firms efficiently and competitively. Over the years we've developed a vast network which allows us to provide our 300+ independent advisors access to the support services and industry partners that advisors in large institutions enjoy without having to be part of a large institution. For more information, please visit us at www.advisornet.com.

You will be a great fit if you enjoy working with people and data in a very dynamic, fast-paced environment. Our group requires people to be friendly, outgoing, and to thrive in an environment working on and in the business at the same time.

Responsibilities

Overview:

The Case Manager acts as the primary owner of life, DI, LTC and annuity applications, ensuring timely and efficient processing of all pending cases. The Case Manager will demonstrate initiative and decision-making skills with the goal to positively impact the producer experience. This position will work in coordination with the Sales Team to provide our financial professionals an exceptional experience, guiding them from initial application until a policy is in-force.

Key Areas of Responsibilities:

- Manage pending life and annuity applications. Conduct initial review of paperwork for completeness and provide timely updates to producers while navigating and resolving issues, acting as a liaison between our producers and insurance providers. Order and review underwriting requirements including APS, supplemental forms, or any other medical requirements for carrier review.
- Maintain a deep understanding of carriers' underwriting, product, compliance, and submission processes through industry professional association membership and utilization of carrier training resources.
- Advocate on behalf of our clients with product carriers in a manner that is both consumer and sales friendly to achieve the most favorable underwriting and new business outcome.
- Use superior language skills to provide exceptional customer service via phone or e-mail in a professional, pleasant, and helpful manner while perceiving and empathizing with emotions of customers.

Qualifications

- 4+ years of experience
- Life insurance license, or ability to obtain within 90 days
- Industry designation preferred (FLMI, ALU, CLU, ChFC, CFP, etc)
- Understanding of life insurance and annuity products
- A drive for continuous professional development and growth
- Ability to react to changes in a productive and positive manner
- Excellent problem solving and analytical skills
- Strong interpersonal and communication skills
- Ability to solve problems while considering the impact to both our clients and our company
- Ability and willingness to support the team, and to help drive progress toward team goals

To apply: Please send your resume to hr@advisornet.com.

Disclaimer: This job description is only a summary of the typical functions of the job, not an exhaustive or comprehensive list of all possible job responsibilities, tasks, and duties. Responsibilities, tasks, and duties of the jobholder might differ from those outlined in the job description and other duties, as assigned, might be required.