ADVISORNET FINANCIAL

Case Manager

(full-time, regular employment)

Primary Purpose:

The Case Manager will support the day-to-day operations including but not limited to, new business and underwriting processing, licensing and contracting, and commissions. This role serves as a point-of-contact for our clients ("Advisors"), Case Managers, and Sales team. The role will cultivate strong advisor and carrier relationships regarding insurance operations to deliver a VIP customer experience.

Key Responsibilities and Essential Functions:

- Interact daily with advisors and carriers to process new business and maintenance requests and answer inquiries or direct them to the appropriate line of business, in a timely manner that meets or exceeds the established standards of the Service Level Agreement (SLA).
- Serve as the point-of-contact for any new or in-force business-related inquiries, concerns, and escalated or complex advisor service requests. Influence insurance operations results by delivering a VIP customer experience.
- Field client service requests, respond to client phone and email inquiries, work directly with insurance carriers, and manage incoming and outgoing mail.
- Maintain and analyze advisor and department needs and provide appropriate solutions or recommendations.
- Maintain a comprehensive understanding of carrier new business processing, licensing, contracting, commissions, and compliance processing standards. Stay current on state laws, industry regulations, and regulatory requirements related to insurance and benefits contracting and commissions.
- Back up the Insurance Operations Specialist in answering and solving licensing questions from producers and employees; maintain the online contracting system and current appointment information; and process carrier appointment requests to satisfy outstanding carrier requirements.
- Back up the Insurance Operations Specialist in leveraging the agency management system (AMS) to analyze data imports and commission statements to ensure the accuracy of payments and reporting. This includes pulling statements from carrier websites and coding them for accounting.
- Assist with policy service requests from advisors and brokers, including agent of record changes, requests for forms and documents, and policy status updates.
- Maintain AMS, customer relationship management (CRM), and other administrative systems, including building production and activity reports on both a regular and ad hoc basis.
- Create, document, and review established standard operating procedures and best practices to ensure effectiveness and efficiency of insurance operations.
- Other special projects and duties as assigned within functional/knowledge area.

Job Specifications:

- Bachelor's degree in finance, business or related field, preferred.

- Insurance or financial services industry experience, preferred.
- Proficiency with Microsoft Office Suite (Outlook, Excel, OneNote, Word), preferred.
- Familiarity with SURELC, preferred.
- Salesforce and other CRM experience, preferred.
- Ability to collaborate across all levels of an organization. Personable, approachable with a positive attitude in providing service excellence.
- Ability to perform under pressure on multiple priorities and projects simultaneously with high visibility in fast-paced environment.
- Ability to collaborate with advisors and departments throughout organization. Personable, approachable with a positive attitude in providing service excellence.
- Ability to work independently with effective problem solving, conflict resolution, risk mitigation, time, and project-management skills.
- Strong professional verbal and written communication skills.
- Knowledge of the structure and content of the English language including the meaning and spelling of words, rules of composition and grammar.