



## **Case Manager Assistant**

The Producers Group is seeking a highly motivated and organized individual with general agency or life insurance carrier experience for a Case Manager Assistant position. Candidate must be a team player and possess ability to handle a high volume workload with a strong sense of urgency. Company culture is high volume, quick turn around and customer centric.

### **Duties and Responsibilities:**

- Provide support to Case Manager/New Business Department (Underwriting).
- Order, receive, follow-up, review and input application and/or vendor requirements.
- Identify forms and information needed to process cases.
- Submit cases for internal and/or external underwriting assessment.
- Review policies for accuracy and prepare for delivery.
- Document agency management system and update spreadsheets as determined by team dynamic.
- Prepare, submit and verify all documents are correctly placed in electronic files or image system.
- Keep current on paperless workflow and image process.
- Keep up to date with carrier and company updates and changes including attending and participating in department and company meetings.
- General administrative functions as needed in the department and possibly various case managers.
- Other projects and duties as assigned.

### **Desired Skills/Experience:**

- Prior life insurance experience either in an agency or at a carrier preferred.
- Knowledge of new business processes, forms, carrier underwriting requirements and case management processing in a general agency environment.
- Experience utilizing agency management system.
- Technical skills to handle a paperless environment and research carrier & vendor websites for information.
- Ability to complete tasks timely, efficiently and with a high degree of accuracy and urgency.
- Excellent customer service skills.
- Proven ability to effectively work with external and internal customers.
- Demonstrated experience in handling confidential and sensitive information.
- Detailed oriented and proven ability to multi-task.
- Ability to work independently and in a team environment.
- Effective communication skills (verbal and written).

**For immediate consideration, please submit resume and salary requirements.**

