Kibble & Prentice

Job Description for:
Benefit Analyst, Employee Benefit Division

REPORTS TO:
Team Leader of Analytical Services

GENERAL DESCRIPTION:
The person in this position is responsible for the financial and contractual analysis of the employee benefit plans for an assigned group of clients.

MAJOR RESPONSIBILITIES:
- Maintain 25-35 client relationships
- Set priorities for analytical work in order to meet deadlines
- Request and summarize proposals from insurance companies. Prepare benefit summaries for current and recommended plans
- Perform technical analysis of group insurance contracts and financial arrangements
- Evaluate renewals for fairness and accuracy
- Prepare renewal spreadsheets and letters
- Maintain necessary commissions for all plans
- Prepare experience reports and renewal projections
- Participate in sales interviews and client meetings
- Request renewals from carriers
- Negotiate on behalf of client
- Think creatively to meet client needs and solve problems
- Prepare and send out confirmation letters

SUPERVISION EXERCISED: None

QUALIFICATIONS:
- Minimum of 6 months of prior group insurance experience preferred
- Four year college degree preferred
- Must obtain life and disability insurance license within 90 days of hire and retain by meeting the continuing education requirements
- Strong functional knowledge of Excel specific to creating, formatting and evaluating formulas and templates. Additionally, the candidate must be able to create, format and evaluate projects in Word, and other MS Office products

PERSONAL QUALITIES/CHARACTERISTICS:
- Highly motivated; a great deal of personal initiative and drive
- High level of energy with positive, can-do attitude
- Ability to set goals, maintain focus and follow-through
- Ability to manage and negotiate multiple priorities and tight timelines
- Ability to perceive needs of clients
- Task and detail focused
- Projects a professional image in action and appearance
- Excellent communication skills, both oral and written
  -Able to communicate complex concepts clearly to all levels of personnel in a company
  -Strong presentation skills
- Team player
- High level of integrity, projects credibility
  - People oriented, very interactive
  - Enjoys active participation in community organizations