Job Posting

Case Management Representative

Position Summary

The **Case Management Representative** role maintains primary ownership of their annuity, life, LTC, med supp & disability cases which requires engaging in frequent communication and coordination between agents, insurance carriers, and internal resources. Responsible for setting their agent's expectations appropriately and providing a World Class Customer Service experience, based on our customer's expectations, throughout the service process.

Examples of Duties

- Receives, reviews, and scrubs new insurance applications for missing information (forms, signatures, policy criteria, etc.) prior to submission to the insurance carrier
- Orders and reviews underwriting requirements (physician statements, exams, supplemental forms, etc.) for submission to the insurance carriers
- Conducts regular follow-up via phone, email and website on all outstanding underwriting requirements
- Organizes and prioritizes workload to ensure case is processed, issued, and placed in a timely manner
- Maintains internal agency management system to document work activity and communication on all assigned cases and agent contracting
- Process and submit contracting to carriers using SureLC and maintain a 24-hour turnaround time
- Provide consistent communication between recruiters, carriers and agents regarding contracting requirements, contract status and commission levels
- Acts as a conduit for all issues associated with a case to include coordination with all internal departments
- Responsible for reviewing issued insurance policies for accuracy before mailing to insurance agent
- Follows up with insurance agents on policy delivery requirements, including application amendments, health statement, insurance premium, etc., to ensure policy is placed within specified timeframe
- Handles escalated issues on cases
- Maintains all department documentation such as manuals, checklists, and PowerPoints
- Trains all new hires to the department and works closely with Lead Case Manager on the training program
- Accepts other duties as assigned
- Records any complaints and notifies supervisor
- Adheres to AIP Marketing Alliance Inc. policies contained in the AIP Marketing Alliance Inc. handbook
- Adheres to provisions of the Confidentiality and Non-Competition Agreement

Qualifications

- ***3+ years of financial planning or insurance knowledge/experience***
- High level of organization and project/time management skills
- Exceptional interpersonal and written communication skills
- Ability to provide excellent customer service to both internal and external customers
- Ability to prioritize and accomplish multiple tasks simultaneously in a fast-paced sales environment
- Capable of working independently as well as in a team environment

- Proficiency with Microsoft Office including Word, Excel, Outlook, and the ability to navigate and utilize the Internet
- Demonstrated history of relationship management success
- Ability to work without close supervision and to exercise independent judgment and problem solving in a professional area
- Strong attention to detail and accuracy
- Ability and willingness to support team to accomplish team goals

Education / Experience

- Four-year college degree in business or a related field or equivalent combination of education and relevant experience is desired.

About AIP Marketing Alliance (AIPMA)

We are an established and successful full-service, national brokerage firm which is seeking a **Case Management Representative**. Founded in 1981, the AIPMA is a National Marketing Organization that specializes in the distribution of Annuities, Life Insurance and Long-Term Care products. Visit **aipma.com** or our **LinkedIn** to learn about AIPMA!