

Position Summary

The **Case Management Associate** role maintains primary ownership of their annuity, life, LTC, med supp & disability cases including agents contracting 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 carrier
- 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
- 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

- **1 to 2 years of financial planning or knowledge / experience**
- High level of organization & 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 Associate**. For over 40 years, AIPMA specializes in the distribution of Annuities, Life Insurance, Medicare Supplements, and Long-Term Care products. AIPMA was acquired by Integrity Marketing Group in 2021 to broaden our capabilities and strengthen our resources and services for nationwide independent insurance wholesalers, agencies, and agents. Visit aipma.com or our [LinkedIn](#) to learn about AIPMA!

About Integrity Marketing Group

Integrity, headquartered in Dallas, Texas, is an omnichannel insurtech leader of life and health insurance, and provider of innovative solutions for wealth management and retirement planning. Through its partner network, Integrity helps millions of Americans protect their life, health, and wealth with a commitment to meet them wherever they are — in person, over the phone and online. Integrity's cutting-edge technology helps streamline the insurance and financial planning experience for all stakeholders. In addition, Integrity develops products with carrier partners and markets them through its distribution network of agencies, brokerages and RIAs throughout the nation. Integrity's nearly 5,500 employees work with more than 420,000 agents and advisors who serve over 10 million clients annually. In 2021, Integrity helped carriers place more than \$7 billion in new sales and oversaw more than \$20 billion of assets under management and advisement through its RIA and broker-dealer platforms. For more information, visit www.integritymarketing.com.