EMPLOYEE BENEFITS DIVISION

Client Manager

JOB DESCRIPTION

Our mission is to help clients protect assets and enhance employee outcomes through the delivery of exceptional risk management and employee benefit consulting services and products.

The **Client Manager** ensures the successful implementation and ongoing service management of health and welfare employee benefit plans.

The **Client Manager** serves as a project manager for renewals, new lines of business and / or carrier transitions. As part of the ongoing client experience, the **Client Manager** is expected to provide well researched guidance and resolution in areas such as claims, file feed integrations, premium billing, coverage issues and regulatory filing requirements.

Timeliness, accuracy, attention to documentation protocols and collaboration with clients, fellow team members and carrier partners is essential.

REPORTS TO
Division Leader

CORE SKILLS

- A passion for delivering an A+ client experience
- Ability to write with clarity and purpose
- Desire to work in a team environment
- Relationship building skills – clients, carriers, and associates
- Project management – design, implementation, execution
- Proficiency in Microsoft Excel (intermediate)
- Employee benefit program knowledge: products, contract features, ERISA (as applied to the management of health and welfare plans)
- A commitment to accuracy and peer review

PRIMARY RESPONSIBILITIES

- Project manager for health and welfare renewals, new lines of business, and / or carrier transitions
- Client service management: provide well researched guidance and resolution in areas such as claims, file feed integrations, premium billing, coverage issues, and regulatory filing requirements.
- Documentation management: Ensure that all client related documentation is accounted for and organized per company guidelines, including:
- Business Associate Agreements, Broker of Record Letters, Data Release Authorizations
- Carrier contracts and certificates
- ERISA plan documents and filings

- Client policy information, fee agreements, and renewal summaries

JOB REQUIREMENTS

- Successful candidates will have at least five years of experience providing outstanding client service in the employee benefits industry.
- Demonstrating niche expertise (e.g. filing requirements, carrier systems, contract review) will be a plus.
- A bachelor's degree is preferred but not required.
- Industry professional designations such as CEBS or similar are desired.

SUPERVISORY RESPONSIBILITY

None

WORK ENVIRONMENT

This job operates in a professional office environment. This role routinely uses standard office equipment such as computers, phones, cell phones, photocopiers, filing cabinets and fax machines.

PHYSICAL DEMANDS

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job.

While performing the duties of this job, the employee is occasionally required to stand; walk; sit; use hands to finger, handle, or feel objects, tools or controls; reach with hands and arms; climb stairs; balance; stoop, kneel, crouch or crawl; talk or hear; and taste or smell. The employee must occasionally lift or move up to 25 pounds. Specific vision abilities required by the job include close vision, distance vision, color vision, peripheral vision, depth perception and the ability to adjust focus.

POSITION TYPE/EXPECTED HOURS OF WORK

Full Time Position – 40-hour work week