



## MEDICARE INSURANCE AGENT JOB DESCRIPTION

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KAZ Company is one of Ohio's premier Medicare agencies, serving thousands of individuals across the country to provide Medicare education, and support in shopping for Medicare products to meet their needs. We are highly regarded in the industry for our emphasis on client service, highly visible approach to marketing, agent training and support, use of technology, and agent lead generation. You will also have a direct connection to the Human Resources departments of many large and mid-market employers through our parent company, The Fedeli Group, one of Ohio's largest independent employee benefit and risk management consulting firms. This connection provides agents a unique platform for additional lead generation and client engagement.

### POSITION SUMMARY

As a KAZ Company agent, you will provide individuals with education, support, and guidance in navigating the Medicare plan selection and enrollment process. You will be responsible for providing exceptional client support and satisfaction, while participating in the development of new client opportunities through an array of KAZ Company marketing channels. Our mission is to impact the lives of those we serve in business and in life. We believe our approach, and our supportive work environment, allows each agent to forge meaningful client relationships, while achieving personal, professional, and financial goals.

### RESPONSIBILITIES

- Effectively educate individuals on Medicare and the available Medicare Advantage and Medicare Supplement programs.
- Quickly and accurately identify the health care needs of the individual and effectively communicate the Medicare solution best suited to their needs.
- Guide individuals through the plan selection and Medicare application and enrollment process.
- Respond timely to leads (from inbound calls and emails, client referrals, employer referrals, Medicare seminars, advertising, among other sources) and make outbound calls to follow up with prospective members who have shown interest in using KAZ Company. The role does not include cold calling.
- Develop expertise in Medicare, Medicare compliance, the available Medicare Advantage, Medicare Supplement and prescription drug plans, and the Medicare application and enrollment process.
- Actively participate in employer and affinity group marketing efforts, including, but not limited to, Medicare education seminars (minimum of one in first twelve months as agent), employer sponsored wellness fairs, professional association presentations, and community events.
- Understand and learn internal policies and procedures.



- Comply with Federal CMS and State legal requirements and standards, including maintaining all applicable licensing and certifications.
- Serve as a brand ambassador for the organization.
- Provide continuous feedback for improvement throughout the Medicare sales team by raising opportunities for improvement to management.

#### **REQUIRED QUALIFICATIONS**

- Desire to impact the lives of those you serve in business and in life.
- Commitment to being proactive and consultative with clients.
- Commitment to lifelong learning.
- Commitment to being collegial, congenial, and collaborative with colleagues, strategic partners, and those we serve.
- Exceptional communication and interpersonal skills with prospective clients, team members, and leadership.
- Outstanding customer service and a desire to serve others.
- Self-motivated.
- Patience in working with seniors.
- Computer proficiency, including the Microsoft Office Suite (Outlook, Word, Excel, Teams, etc.).
- Flexible schedule to accommodate client meeting needs.
- Active health insurance license.

#### **PREFERRED QUALIFICATIONS**

- Medicare Advantage or Medicare Supplement Insurance Sales and/or Customer Services experience.
- Bachelor's Degree or equivalent insurance or service industry experience in the over 65 market.

#### **BENEFITS**

- Market competitive incentive compensation program.
- Marketing and administrative expenses covered by KAZ Company.
- Access to an array of lead generation resources, including print, television, radio, And employer and affinity group marketing channels (retail stores, employer groups, municipalities, etc.)
- In office support personnel and technology support.