Benefit Account Manager

LBW Insurance & Financial Services, Inc. is looking for an experienced Benefit Account Manager for our very successful Benefit Department.

LBW is the largest independent full-service Insurance Agency in the Santa Clarita Valley area. We are a boutique agency that provides a very high quality, high touch level of service to our clients and we are looking for the right person to join our terrific team.

Job Description

Primary Functions:

The Benefit Account Manager is responsible for maintaining and working with Large/Small Groups clients. Must be able to perform all essential duties and responsibilities listed below

Essential Duties and Responsibilities:

- Processing New Business Broker of Record – by submitting BOR letter; Verifying with carrier(s) of receipt; Confirming policy numbers and commission schedule; Setting up new working file for each line of business; Receiving contract, plan summary, current billings, and renewal terms; Enter policy detail in BenefitPoint including plan description, premiums, number of employees, etc.
- Renewal/Quoting Business -Prior to renewal – obtain/request renewal from carrier(s), contact client 90 days prior to their anniversary date to discuss their needs; Determine if they are satisfied with their current carrier or if it needs to be marketed. Analyze and evaluate client's current benefits program and needs; Suggest any possible additional coverages they may need; Generate renewal letter; Gather necessary renewal information (Risk Questionnaire, current census, and renewal rates); Prepare and submit request for quote including plan design & carrier selection or self-quote via carrier website(s); Review quotes and prepare proposal; Present renewal proposal to client in person or via Zoom.
- Marketing – Must be able to determine market selection and plan design for each renewal; Prepare RFQ and submit to selected carrier(s); RFQ must be complete, accurate, and include all current and pertinent information for the carrier to successfully rate the group; Follow up with carriers to ensure receipt of quote by our requested due date; Review quotes and prepare proposal.
- Client Services & Administration - Receive, document, and process all Large/Small Group insured's requests for service; Assist clients with claims and billing problems; Keep clients informed and updated on current events, changing markets, new products, etc.; Maintain client files (Large/Small Group)
- Assist with open enrollments, in person or via Zoom
- Automation- Maintain calendar and activities on Outlook; ensure all follow-up transactions are being completed in a timely manner; Maintain accurate and current activity logging on all transactions; Maintain current customer and policy information in BenefitPoint.
- Other Duties - Attend various departmental and other office meetings; Remain up to date on coverage changes, current legislation, education, and technical expertise; Complete required CE credits to maintain your insurance license; Participate in seminars and classes for

knowledge and skill development; Maintain and update renewal, new and written business logs.

Job Requirements

- Must have great customer service skills and 5+ years managing large and small group accounts
- Prepare RFP and have knowledge of the individual marketplace
- Be able to market new and existing clients
- Must be knowledgeable on ACA
- Must be able to work in a fast-paced environment and meet deadlines in an organized manner
- Must have a current and active California Life and Health Insurance License
- Knowledge of Microsoft Office is a must
- Experience with BenefitPoint, Health Connect or other quoting system would be a plus
- Needs to have good communicate skills with strong attention to detail
- Assist Sales Team in client meetings
- A team player

We offer a great working environment, competitive salaries, 100% Paid Medical & Dental Benefits for the Employee, a matched 401K plan, and other excellent Benefits.

Hybrid work available.