

Benefits Design Group
Job Description for Sales Associate

ESSENTIAL FUNCTIONS:

- Handle phone calls and provide optimal customer service.
- Processing all client service requests and preparing correspondence when requested.
- Liaison between client, advisor, and vendor operations department.
- Assist with pre-sale and post-sale support including preparing proposals, and illustrations.
- Provide accurate and prompt processing of applications, ensuring proper handling of settlements received, coordinating and case handling during underwriting, preparing issued policies for delivery, and recognizing and resolving problem situations.
- Maintain client files to be compliant and update notes in the Client Database System.
- Update Client Database System with inputting new clients and keeping existing client information up-to-date.
- Prepare reports and presentations for advisor to use with client meetings.
- Assist with marketing initiatives and events.
- Performs general clerical activities, including faxing, copying and filing.
- Performs other job-related duties and responsibilities or special projects as assigned.

REQUIRED SKILLS/EXPERIENCE:

- Bachelors' degree is preferred, but not required.
- Life and Health License, Series 6, Series 63 is preferred.
- Organizational and time management skills to prioritize workflow and ensure duties and projects are completed by deadlines.
- Reasoning and problem solving skills to research and resolve general problems.
- Using organizational discretion applies critical and thinking and problem-solving skills to client-related issues.
- Takes ownership and facilitates resolutions to client issues and mobilizes the internal teams necessary to solve escalated issues.
- Ability to multi task many different clients at once, must be able to manage and prioritize their needs.
- Demonstrate efficiency and flexibility in performing detailed transactional tasks in a fast-paced work environment with frequent interruptions and changing priorities.
- Advanced communication skills and professional demeanor to interact with all levels of management, other associates and counterparts at other firms.
- Work independently and in a team environment.
- Work well under stress created by time deadlines, workflow volume changes, and telephone/associate inquiries.
- Learn and apply new information, skills, and processes, quickly including the various regulations and back office systems.

HOW TO APPLY

Please send resume to: scaro.donald@princor.com.

This is an immediate opening and interviews will be conducted as soon as possible. Please visit our Olathe Chamber of Commerce page or our website, <http://www.benefitsdesigngroup.cc/>, to obtain more information about our company.