

Insurance Coordinator

Reports to: Director of Insurance

Status: Exempt

Duties:

- Process applications for life insurance, annuities, long term care, disability insurance.
- Track cases through all phases of the underwriting process.
- Follow up as needed with clients, insurance carriers and third-party vendors.
- Maintain client database records for cases and clients.

Minimum Education:

- Bachelor's Degree preferred

Skills and Experience:

- 1 year of experience
- Required Licensed in Life and Health
- Preferred background in insurance and/or finance.
- Ability to build rapport over the phone with multiple insurance carriers.

Firm Requirements:

- Must maintain client confidentiality
- Ability to ensure compliance of firm's policies and procedures
- Attention to detail with strong oral and written communication skills
- Ability to prioritize and multitask
- Strong interpersonal skills
- Strong organizational and documentation skills
- Creative, flexible, and persistent in completing tasks
- Strong initiative; ability to work independently
- Very experienced in MS Office Suite (Windows, Word, Excel, Email)

Working Conditions:

- Work is carried out in a controlled, agreeable environment as generally represented by normal office conditions

Mental and Aptitude Requirements:

- Analytical, conceptual, problem solving and decision-making skills

Physical Requirements:

- Physical exertion includes bending, pushing, standing and walking. Must be able to move or lift approximately 25 pounds.
- Ability to speak clearly and distinctly
- Good vision and good hearing acuity (with glasses and hearing aids, if necessary)

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Background check required for all employees