



# LION STREET<sup>TM</sup>

Owned by Fiercely Independent Advisors

## **Contracting and Licensing Specialist**

Due to our continued growth, Lion Street is seeking our next dynamic Contracting and Licensing Specialist to join our team. By joining our experienced team of life insurance professionals, you will be responsible for providing contracting and licensing support to owner-firms to drive business through Lion Street. This role is based in Austin, Texas.

### **Job Description**

The Contracting and Licensing Specialist is responsible for:

- Reviewing, processing, and submitting contracting paperwork for carrier appointments
- Establishing agent contracting profile in SureLC, the Lion Street online contracting tool
- Case managing requirements to complete carrier contracting and appointments.
- Advising agents of expired, missing, or additional carrier or product specific requirements.
- Answer licensing and continuing education related questions from LS Staff and agents/staff
- Documenting all significant actions in agent/firm's Agency Integrator and SureLC accounts
- Maintaining current data in appropriate LS systems, such as, agent codes for specific carriers, E & O, and CE training status
- Directing agent to appropriate resources for working directly with the state department of insurance.
- Primary administration of SureLC system (maintain appropriate carriers, forms, and fillable data, hierarchies etc.)
- Setting proper expectations with agents, firm staff and internal staff regarding expected timeline to complete contracting
- Utilizing web-based document management system to organize, manage and transmit documents

### **Desired Skills and Experience**

Prefer a candidate with experience in the life insurance industry, in a multi-carrier environment and with multi-state insurance licensing knowledge. Must have the ability to maintain a high level of accuracy, dependability, and demonstrate a strong desire to provide exceptional customer support.

Additional qualifications include:

- Strong attention to detail and the ability to adhere to set processes and procedures
- Exceptional communication and customer service skills
- Willing to take initiative, exhibit critical thinking/problem solving skills.
- Ability to adapt quickly to change
- Positive self-starter attitude and strong desire to provide excellent results in a dynamic, fast moving start-up company.
- Prior experience with, or quick ability to effectively learn various computer software applications including, Agency Integrator (CRM), PaperClip (Document Management), Surebay SureLC
- Experience with Microsoft Outlook, Word, Excel, PowerPoint and WebEx
- Bachelor's degree preferred

### **Benefits**

In exchange for your hard work and dedication, we offer:

- Competitive compensation package
- Medical, dental, vision, life insurance and disability
- Paid time off
- 401K with company match

We work to maintain the best possible environment for our employees, where people can learn and grow with the Company. We strive to provide a collaborative, creative environment where each person feels encouraged to contribute to our processes, decisions, planning and culture.

### **About the Company**

Lion Street is a leading financial services company based in Austin, Texas. Lion Street provides elite independent life insurance and wealth advisory firms access to the financial products, intellectual capital, and specialized resources they need to meet the sophisticated needs of high-net-worth and corporate clients. Every affiliated financial advisor is a stockholder of Lion Street. Together, Lion Street's Owner-Firms are strongly committed to building a fiercely independent, yet highly collaborative network of professionals.

For more information on Lion Street, please go to [www.lionstreet.com](http://www.lionstreet.com).