



LION STREETTM

Owned by Fiercely Independent Advisors

Job description

Due to our continued growth, we are seeking a dedicated Life Insurance Case Manager to provide internal and agent support for life insurance brokerage activities. Joining our team of other experienced case managers, you will provide administration and operations support to Lion Street Owner agencies by performing the following duties:

- Efficiently manage the submission of individual life insurance applications to life insurance companies
- Reconcile outstanding pending case requirements and requests for additional information with agents
- Advocate and negotiate with life insurance carriers on informal and formal offers
- Set proper expectations with life insurance agents, regional sales managers and others regarding pending case requirements, timelines, etc.
- Communicate via email and phone to agents in conjunction with supporting their various case
- Utilize web-based document management system to organize, manage and transmit documents
- Utilize web-based agency management system for case activity management, tasks, memos, etc.
- Generate status reports for management, agents and others as needed

Desired Skills and Experience

The ideal candidate must have 3-5 years (minimum) experience working as a life insurance case manager. Prefer experience with a multi-carrier environment and managing complex or large cases for independent advisors that work with high net worth individuals. Must have the ability to maintain a high level of accuracy, enthusiasm and dependability, and demonstrate a strong interest in providing exceptional customer support.

Only qualified applicants should apply, with job experience working at a major life insurance carrier, life insurance brokerage operation or an independent life insurance practitioner. Additional qualifications include:

- Strong communication and customer service skills
- Willing to take initiative, exhibit creative thinking and take ownership of cases
- Self-starter attitude and strong desire to provide excellent results
- Prior experience with, or quick ability to effectively learn various computer software applications including, Agency Integrator (CRM), PaperClip (Document Management), etc.
- Experience with Microsoft Outlook, Word, Excel, PowerPoint and WebEx
- Bachelor's degree preferred
- Ability to excel in a dynamic, fast-moving start-up company environment

Benefits

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

- Competitive compensation package
- Medical, dental, vision and life insurance
- Voluntary 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.

Equal Opportunity Employment

About this company

Lion Street is a privately held financial services distribution company based in Austin, Texas. Lion Street provides elite independent life insurance producers access to the financial products, intellectual capital, and specialized resources they need to meet the sophisticated financial planning needs of their high-net-worth and corporate clients.

Founded by Bob Carter in 2010, Lion Street is managed by a team of experienced industry veterans and is a portfolio company of Austin Ventures.