



# LION STREET<sup>TM</sup>

Owned by Fiercely Independent Advisors

## **Life Insurance Case Manager – Institutional Services**

Lion Street is expanding lines of business to the Institutional Services space to continue to grow our life-centric network. With our continued growth, we are looking to add to our Life Insurance Case Management group. In this position, you will work with our Institution Services group to provide case management services for financial institution clientele. This position will be based in Austin, TX with remote opportunities for the right candidate.

### **Job Description and Duties**

This position is responsible for daily activities in case management. Works with internal departments including Underwriting, Case Design, and Sales Vice Presidents.

- Efficiently and effectively manage the submission of individual life insurance applications to life insurance companies
- Reconcile outstanding pending case requirements and requests for additional information with Sales Vice Presidents
- Advocate and negotiate with life insurance carriers on informal and formal offers
- Successfully manage new business life insurance applications through the underwriting and delivery process
- Communicate via email and phone to Sales Vice Presidents, 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, sales vice presidents, and others as needed
- Have a sense of urgency without losing attention to detail, and the ability to multi-task in a high paced environment

### **Desired Skills and Experience**

Qualified candidates must meet minimum job qualifications. The ideal candidate must have three to five years' experience working as a life insurance case manager. Prefer experience with a multi-carrier environment and managing complex 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**

Lion Street offers full benefits to full-time employees, which includes:

- Competitive compensation package (annual bonus eligibility)
- Medical, dental, vision and life insurance
- STD/LTD
- Paid Time Off
- Safe Harbor 401K Plan
- Located in downtown, we offer a gym discount, provide commuter allowance, and a great view of Austin
- Company provides snacks, assorted beverages and a stand-up desk workstation

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.

[www.lionstreet.com](http://www.lionstreet.com)

Lion Street, Inc. is a privately held financial services distribution company based in Austin, Texas. Lion Street provides elite independent financial advisors, many of which have roots in the life insurance industry, 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. The Broker-Dealer, Lion Street Financial, LLC and RIA, Lion Street Advisors, LLC are also based in Austin, Texas. Founded in 2010, Lion Street is managed by a team of experienced industry veterans and is a portfolio company of Austin Ventures.

*NOTE: The information on this description has been designed to indicate the general nature and level of work performed by employees within this classification. It is not designed to contain or be interpreted as a comprehensive inventory of all duties, responsibilities and qualifications required of employees assigned to this job.*