



LION STREETTM

Owned by Fiercely Independent Advisors

Life Insurance Case Manager

Lion Street is adding to our Life Insurance Case Management group. In this position, you will work with our elite affiliate firms and producers to provide case management services for life insurance brokerage activities. This position will be a part of Lion Street's life insurance division, based in Austin, TX.

Job Description and Duties

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

- 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.
- Ability to review and identify abnormal answers or findings on Basic Underwriting/NB items: Exams, MVR, applications, questionnaires
- 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
- Have a sense of urgency without losing attention to detail, and the ability to multi-task

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, and handling cases. 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

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.