



# LION STREET<sup>TM</sup>

Owned by Fiercely Independent Advisors

## Life Underwriter

Due to Lion Street's continued growth, we are seeking an experienced Life Underwriter to join our dynamic team to provide underwriting support to our insurance brokerage activities. This position is eligible for remote work or based in Austin, TX, relocation assistance is available for those who qualify and interested.

Joining our experienced underwriting team, they will provide a broad range of underwriting support services to include the following:

- Case consultation to include case strategy and medical impairment reviews, cover letters and case packaging, and carrier selection and negotiations.
- Summarizing and assessing cases and identifying solutions to streamline these processes
- Direct coordination with new business and case management teams and processes and other Lion Street sales and product teams
- Facilitate relationships with carrier underwriters and have a strong understanding of underwriting landscape & niches
- Educating firms on underwriting best practices and supporting development of tools and resources for firms
- 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.
- Generating status reports for management, agents and others as needed

### **Requirements:**

The ideal candidate must have 5 - 8 years (minimum) experience working as a life insurance underwriter. Prefer experience with a multi-carrier environment and working on 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 skills in time service and new business operations
- Experience with financial underwriting and working with reinsurance on large or complex cases

- Willing to take initiative, exhibit creative thinking and take ownership of cases
- Prior experience with Quick Quotes, Carrier Guidelines, XRAE, and Underwriting Manuals
- Prior experience with tools/technology including, Agency Integrator (CRM), PaperClip (Document Management), and others
- Hold or pursue FALU and FLMI industry designations
- Experience with Microsoft Outlook, Word, Excel, PowerPoint, and WebEx
- 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

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.*