

Employee Benefits Large Group Account Manager – Position Description

Reports to: Director – Employee Benefits

Position Summary:

This position serves as the primary contact for large group employee benefit clients and is primarily responsible for large group account retention.

Role/Responsibilities:

- Manage renewal process, RFP's, Plan marketing, and Open Enrollment.
- Responsible for primary servicing of accounts which includes execution of Service Timeline with open, clear, and timely communication with clients and producers.
- Coordination of calendars/meetings with producer and clients
- Responsible for regular client interaction as established by the Agency and Service Timeline. Attendance of client meetings on-site when appropriate. Occasional overnight travel may be required.
- Preparation of materials for client meetings including, but not limited to, proposals, meeting agendas, reports, Service Timelines
- Responsible for creating and managing Open Enrollment materials and / or Ease web-based enrollment site.
- Responsible for education and advice on Compliance topics including, but not limited to ERISA, COBRA, FMLA, 5500's, and ACA
- Preparation of group insurance contracts and Plan Documents
- Administration of renewals and related contract changes
- On-site and virtual Open Enrollment meetings
- Resolution, support, and oversight of employee and employer issues
- Other miscellaneous duties as assigned
- Edit and finalize videos, as well as manage RiskPoint Youtube account for storage and housing of videos.

Knowledge, Skills, and Abilities:

- Minimum 2-4 years of experience in employee benefits or related marketplace experience.
- 4-year college degree or industry specific education designation
- Prior Account Management experience preferred
- Must currently hold Health, Life, and Disability insurance license and meet continuing education requirements
- Ability to set priorities and manage workflow independently to ensure efficient, timely, and accurate service to RiskPoint clients.
- Enthusiastic attitude, cooperative team player, adaptable to new or changing circumstance, professional demeanor.

Physical Demands:

- Able to sit for long periods of time, use repetitive small motor activity, use hands and fingers, and reach with hands and arms
- Occasional lifting up to 20 lbs

I have read this job description and fully understand the requirements set forth therein. I understand that this is to be used as a guide and that I will be responsible for performing other duties as assigned. I further understand that this job description does not constitute an employment contract with RiskPoint Insurance Advisors, LLC.

Employee Signature

Date Signed