



Job Title: Medicare Support Coordinator
Department: Medicare
Reports to: **Medicare Direct & Brokerage Director**

Role objectives:

KAFL, Inc support our advisors either in a brokerage capacity or as a trusted partner in our Medicare Direct model. We will support the advisors with training and the certification process which enables them to provide Medicare solutions to their clients and prospects. We realize some advisors prefer to hand off their Medicare business to a trusted partner, who can assist their clients with Medicare planning. KAFL will help those advisors by assisting their clients with those needs and sharing a referral fee with the advisor.

Responsibilities:

- Support our KAFL Medicare Brokerage and Medicare Direct team in all aspects of supporting our clients and advisors.
- Assist in launching and administratively supporting our Medicare direct model.
- Schedule, organize, and prepare for meetings with direct clients (virtual and face-to-face).
- Assist with all forms of Medicare customer service.
- Assist with marketing efforts with advisors and groups.
- Help facilitate the timely submission of applications.
- Research and track production with carrier partners.
- Assist with social media and website updates.
- Assist with licensing and commission questions.
- Onboard new advisors into our brokerage model.
- Track referral activity.

Skills:

- **Strong Organizational Skills:** Organization and persistence are valuable assets. Recognizes what needs to be done in order to achieve identified goals. Structures time and prioritizes to meet objectives. Willing and eager to learn.
- **Teamwork and Collaboration:** Contributes to the efforts of the organization as a team player. Works with KAFL Individual Sales and Employee Benefits teams to identify and capitalize on Medicare opportunities.
- **Strong Analytical Skills:** Ability to evaluate the needs of each client to determine and effectively communicate appropriate plan benefits. Comfortable with technology.
- Strong Interpersonal and Communication Skills.



- **Strong Customer Service skills:** Demonstrate empathy with all clients, support advisors, and clients to answer questions, solve problems, and deliver quality service.

Qualifications:

- Active NYS Life, Accident, Health license (or willing to obtain) Required
- Demonstrated Medicare experience, either as an advisor or carrier representative is preferred
- Strong computer skills and ability to use various software, such as Microsoft Word, Excel, insurance quoting software and customer relationship management software
- To be successful in this role, the candidate must be self-motivated, embrace collaboration with partners, consumers, and team members, while operating with integrity to meet consumer needs

Our Core values we live by:

- **Integrity** - Doing right by our advisors and clients regardless of revenue outcomes to our organization is of the utmost importance to our team.
- **Respect** - Models respect for others while encouraging a culture of listening.
- **Accountability** - Self-motivated; We would like the candidate to commit to the activity it takes to become a successful sales and marketing professional. This will include independent learning outside of normal business hours as well as a commitment to getting the job done when high-priority opportunities present themselves.
- **Innovation** - new ideas are welcome on our team. We look to all members to bring improvement suggestions to our process and service models.
- **Collaboration** - The ability to work with a team includes the ability to develop relationships that promote open communication. The team will expect the ideal candidate to have fun, work hard and make a joint effort to grow as a unit sharing ownership in challenges and success.

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Medicare Support
Coordinator

Date