KAFL INSURANCE RESOURCES

Job Title: **Policy Service Coordinator**
Department: Brokerage Marketing Team
Reports to: Internal Sales Manager

Role objectives:

We are a national multi-line Brokerage Agency that provides dedicated support and innovative resources to those who provide financial solutions to families and businesses. Our Brokerage Team is motivated, forward-thinking individuals who develops advisor relationships and designs creative product solutions with advanced marketing concepts. We work as a team and we take pride and ownership of being a trusted partner to our advisors. The Client Service Representative will support a team of sales and case design specialists with administrative and opportunity development support, that will enable them to focus on revenue driving activity.

Responsibilities:

- **Policy owner servicing requests**
  - Manage intake system for our advisors' requests
  - Inquire with carriers to gather policy information
  - Prepare paperwork for clients and forward to advisors
  - Manage communication for cross team collaboration
  - Maintain a reasonable turn around time on requests
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- **Inforce Project Management**
  - Pull dynamic reports for sales, marketing and advisors
  - Confirm inforce status and key contract information
  - Work in partnership with Internal Sales Manager on inforce campaigns and system initiatives

Skills:

- **Strong Organizational Skills**: Organization and persistence are valuable assets. Recognizes what needs to be done to achieve identified goals.
- **Teamwork and Collaboration**: Contributes to the efforts of the organization as a team player. Works with KAFL Individual Sales, Senior Care and Employee Benefit teams to identify and capitalize on opportunities.
- **Strong Analytical Skills:** Ability to evaluate the needs of each client to determine and effectively communicate complex concepts. Comfortable with technology.

- **Strong Interpersonal and Communication Skills**
- **Business Acumen:** Has a sense of ownership and drives positive results. Understands when to leverage resources and fiscal responsibility.
- **Adaptability:** Ability to adapt to a changing environment and systems. Able to prioritize and work well under pressure.
- **Learning:** Passionate about learning and has a growth mindset.
- **Time Management:** Structures time and prioritizes to meet objectives
- **Communication**: Strong communication skills with the ability to share back information with team members or advisors

<u>Qualifications:</u>

- Must be proficient in Microsoft Excel & Word
- General understanding of the financial services industry and illustration systems
- Comfortable with the implementation of marketing initiatives
- Life, Accident & Health Insurance Licensed or willingness to obtain

<u>Our Core values we live by:</u>

- **Integrity** - Doing right by our advisors and clients regardless of revenue outcomes to our organization is of the upmost 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.

X ______________________________ ______________________
Policy Service Coordinator Date