

**Position Title: Account Manager**

<b>Employee Name:</b>	
<b>Date of Hire:</b>	
<b>Review Date:</b>	
<b>Employment Category:</b>	Exempt
<b>Supervisor:</b>	
<b>Mentor:</b>	

**Company Mission & Value Statement**

JA Counter is as an investment and insurance agency, specializing in individual and employer sponsored risk and benefit consulting. Our mission is to provide exceptional service to our clients as we provide innovative, customized solutions, education, knowledge, and resources delivered with integrity and professionalism. We accomplish this through knowledgeable employees by providing an environment, so they can and bring value to this mission by:

- Expecting far more from ourselves than we do from others
- Being pioneers with the courage to take reasonable risks
- Inspiring excellence and success
- Leading with integrity and wisdom
- Having fanatical attention to service, consistency and detail

**Basic Function**

This position has the primary responsibility for retention of existing accounts. Provides prompt, efficient, high-quality service to designated accounts. To build relationships with clients and continue to service them to help them achieve their goals.

**Primary Responsibilities:**

1. Build relationships with employers and service them to help them understand their benefits package and how to administer it;
2. Conduct employee meetings to educate on benefit decisions, utilization of plans and consumerism;
3. Act as a compliance resource to clients providing guidance and education on compliance issues and regulations affecting their employee benefit plans;
4. Review, for accuracy and completeness, all customer forms, enrollment applications, and master applications for submission to carriers;
5. Partner with account team to provide excellent, unified service to clients;
6. Proactively manage all renewals, in a timely fashion, by contacting client within 48 hours of initial receipt and aligning actions to client goals and objectives;
7. Maintain accurate and complete client data in client relationship management database (CRM); including documentation and management of action items and client interaction;
8. Adhere to service model and timelines developed to maintain profitable business while delighting the client;
9. Maintain a strong and productive working relationship with carriers and a clear understanding of the products and services offered;
10. Attend social functions in the community as opportunities present themselves, representing JA Counter in a professional manner.

**Minimum Qualifications**

Associate degree or equivalent work experience in financial services or benefit services related position.

Ability to:

- Read and interpret documents such as summary plan descriptions, insurance certificates and contracts.
- Document on-going activities clearly.
- Communicate difficult, industry topics in a clear, concise manner that is understandable to a layperson.
- Ability to calculate figures and apply basic mathematical concepts.
- Ability to solve problems and deal with a variety of variables where only limited standardization exists.
- Ability to interpret a variety of instructions furnished in written, oral, diagram or schedule form.

**Account Manager Characteristics**

Relationship Builder:

- Independent thinker;
- Understands the client and their needs;
- Strives to makes clients look good, client success is our success;
- Engages with others to make them feel valued;
- Articulates information clearly and effectively through various communications methods;
- Demonstrates “Yes, I can attitude”.

Project Management:

- Detailed oriented;
- Manages multiple projects with various timelines;
- Identifies a process from a distance;
- Investigates needs, identifies actions and drives the process;
- Delegates activities as appropriate;
- Holds others and self accountable for timelines.

Business Acumen:

- Understands clients’ situation and makes recommendations;
- Views needs through client lens;
- Identifies financial disparities in documents;
- Thinks like a business owner.

Intermediate computer skills including use of client relationship management database, Microsoft Office, spreadsheets, internet and e-mail.

**Work Environment/Physical Demands**

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Standard office environment. While performing the duties of the position, the employee is regularly required to sit and talk or hear. The employee is regularly required to stand, walk, use hands to finger, handle or feel, and reach with hands and arms with occasional under 10 lbs. lifting requirement. Vision perception is normal for administrative duties. Travel is required for coordination of meetings, events, etc.

This job specification should not be construed to imply that these requirements are the exclusive standards of the position. Employee will follow any other instructions and perform any other related duties as may be required by their supervisor. To perform this job successfully, employee must be able to perform each essential duty satisfactorily. The requirements listed are representative of the knowledge, skill and/or ability required.