



Title: Account Executive – Health Insurance

Reports To: Branch Principal

Job Summary: This position is responsible to sell and negotiate health insurance, including Medicare, Individual & Family, and Group Benefits. Successful Producers must be able to implement marketing strategies to drive new business and retain existing clients. Account Executives will evaluate the needs of their clients and financial capacity, then develop a proposal to meet their needs within constraints.

Date: 05/01/2022

PRIMARY RESPONSIBILITIES AND DUTIES

- Provides service to clients' changing insurance needs by selling life, health, and disability insurance.
- Establishes productive working relationships with clients.
- Develops base for long-term sources of clients.
- Compiles lists of prospects.
- Establishes, tracks, and reports on goals for production with Health Department Lead and Branch Principal.
- Renewing assigned accounts, including reviewing policy coverages and updating account information with carriers and the internal CRM.
- Direct marketing, fact-finding, submitting, and writing new accounts.
- Assist clients as needed with servicing their insurance policies.
- Enhances insurance agency reputation by accepting ownership for accomplishing new and different requests and exploring opportunities to add value to job accomplishments.

MEASURES OF PERFORMANCE

The Account Executive is performing in a satisfactory manner when the following criteria have been met or exceeded:

- All clients are contacted at least 30 days prior to renewal, or as assigned
- All clients who wish to have individual meetings are accommodated
- Minimum production goals are met (determined in conjunction with Branch Principal)
- A 90% annual retention rate for preferred clients is maintained

SUPERVISORY RESPONSIBILITY

This position does not have any direct supervisory responsibilities.

WORK ENVIRONMENT

This position will be physically located in the Klamath Falls office. This job operates in a professional office environment. This role routinely uses the standard office equipment such as computers, phones, photocopiers, filing cabinets, and fax machines.

PHYSICAL DEMANDS

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. While performing the duties of this job, the employee is regularly required to talk or hear. The employee frequently is required to stand; walk; use hands to finger, handle or feel; and reach with hands and arms.

POSITION TYPE / EXPECTED HOURS OF WORK

This is a full-time position, and regular hours of work and days are Monday through Friday, 8am to 5pm; however, this position can regularly require long hours and frequent weekend work depending on client needs and annual enrollment periods.

COMPENSATION & BENEFITS

Salary information is described in your offer letter. Benefits are available after a 30-day waiting period. Employer provides employer-paid health insurance (Employee Only), HSA contribution, Dental, Vision, Short and Long Term Disability, employer-paid Life (1x Annual Salary), Voluntary Life & AD&D, PTO + Vacation, and other ancillary benefits.

OTHER DUTIES

Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities, and activities may change at any time with or without notice.

EMPLOYEE ACCEPTANCE

This job description is intended to serve as a general list of the requirements for this position, the authority for action that the person occupying this position has, and the responsibilities and duties to be performed. It is not intended as a contract for employment, nor does it guarantee employment for a period of time.

The Managing Partners retain the right to change any portion of this job description at any time and the incumbent will be notified of such change in writing.