

Position Title: Account Executive
Hours: Full Time
Location: Denver (DTC)

Classification: Exempt

Position Summary

This is a position providing prompt, accurate, courteous service to customers, producers and company personnel with a positive attitude and a high level support in obtaining, maintaining, expanding and servicing employee benefits accounts.

Essential Duties and Responsibilities:

- Accompanies the producer to most, if not all meetings with prospects
- Obtains any information needed for follow-up meetings with the prospect (i.e. quotes, carrier information, network information, answers to any questions prospect may have)
- Provides prospect with list of needed information in order to quote his or her company
- Initiates continued communication with prospect
- Continually networking with prior prospects and other relationships
- Sets up meetings, lunches etc with prospects
- Attends carrier training meetings, legislative sessions when needed, any sales conference related to employee benefits
- Keeps updated on all legislative updates
- Maintains reputable relationship with all carriers
- Continues to be educated on all carriers new products and policies
- Over see's any open enrollment meeting new group may have. (i.e. coordinates with carriers and vendors, orders supplies, over see's creation of customized benefit book for prospect)
- Maintains a professional friendly attitude at all times. Account Executive is the gatekeeper to all communication with current clients, prospects and carriers. Account Executive is key role in representing our agency.
- Over looks entire renewal process of current clients
- Negotiates renewal rates and options with carriers on current clients
- Document all customer interactions and transactions in the agency management system
- Develop and train Account Managers and Assistant Account Managers
- Maintain direct communication with company underwriters
- Pursue a program for personal and professional development (education classes, seminars, workshops) in combination with individual study programs to expand your knowledge and skills
- Travel to meet with clients, when needed (travel may include trips to UT and Idaho as needed)

Qualifications:

Education and Experience:

- High School diploma or equivalent required
- College degree from a four year university, or equivalent combination of education and experience
- Eight or more years of experience in employee benefits insurance

Licenses or Certifications:

- Life, Accident & Health License required

Required Job Knowledge and Skills:

- Knowledge of and familiarity with current Health, Life, Dental, Vision, Long Term Disability (LTD), Short Term Disability (STD) and Long Term Care products
- Knowledge of and familiarity with PPACA current and proposed regulations
- Ability to establish and develop strong relationships with clients, carriers, trusted business partners and coworkers
- Business development and financial evaluation skills
- Good organizational and time management skills
- Ability to work well with details
- Proficient in a variety of computer software applications used by the agency, including MS Word, Excel, Outlook and PowerPoint; EPIC; as well as the Internet and Carrier Web Sites

Physical:

Ability to lift 25 lbs, communicate effectively verbally and in writing; ability to operate copier, scanner, fax, calculator and telephone; ability to perform repetitive hand movements such as those required for computer work, and other physical abilities to perform the job responsibilities as detailed above.