



Provada

The Next Generation of Insurance Brokerage™

Case Manager

To apply for this position, go to <http://www.as-c.ca/a.asp?id=9126C4>

ABOUT US

Provada is the culmination of over 140 years of experience in the life insurance industry. During that time, we have learned what it takes to succeed as a financial professional. And we have learned what financial professionals need from a brokerage firm to assist them in reaching their highest potential.

Provada has been designed first and foremost with the needs of our clients in mind. These clients include insurance agents, financial planners, CPAs, and other financial professionals who need access to a wide range of life insurance products delivered with premier service. We work directly with advisors in addition to having special arrangements with insurance agencies, independent broker-dealers, and other financial firms.

We are creating The Next Generation of Insurance Brokerage™ - a business model that will give us a sustainable and significant competitive advantage for many years to come. The key to proper execution of this model is the **Provada** team members. We are looking for an exceptional person to join our team and make a major contribution to our success.

ABOUT THE POSITION

As a Case Manager and a valued member of our team, you will be responsible for successfully processing insurance applications from the time they are received through the point at which the policy is issued. You will be required to assume a significant amount of relationship management responsibility interacting with a wide variety of internal and external parties.

ESSENTIAL DUTIES AND RESPONSIBILITIES

- Review all incoming insurance applications to make sure they are properly and thoroughly completed
- Ensure that all carrier requirements have been ordered and completed including medical exams, inspection reports, and attending physician statements
- Pre-underwrite submitted applications, exams and medical records
- Communicate application status to all interested parties (agents, carriers, brokerage directors, and management)
- Update case management software
- Access carrier websites to check status or obtain necessary information
- Recommend specific carriers for impaired risk cases
- Negotiate for preferential rates with insurance carriers
- Work with internal underwriters and medical staff
- Maintain and solidify relationships with our clients (insurance agents, other financial professionals, and their staff)

SKILLS

1. Excellent oral and written communication skills
2. Excellent organizational skills, work prioritization and follow-through ability
3. Strong attention to detail and results-orientation
4. Ability to resolve issues utilizing sound judgment and reasoning skills
5. Excellent time management skills
6. Manage a variety of responsibilities with constantly changing priorities
7. Strong customer-focus with an emphasis on relationship building
8. Ability to work independently and take initiative ; Proactive
9. Ability to employ creative and innovative thought processes
10. Ability to be flexible and adaptable
11. Ability to retain and recall detailed and complex regulatory information

12. Ability to maintain confidential and/or sensitive information with care and professionalism
13. Take initiative in identifying and resolving problems
14. Strong interpersonal and teaming skills

QUALIFICATIONS AND REQUIREMENTS

- 3+ years of life insurance experience, preferably in a case management role
- Life insurance license and/or LOMA designations preferred
- Demonstrated history of successful relationship management
- Bachelors Degree preferred but not required
- Proficiency ins Microsoft Windows, Word, Excel and Outlook

WORK ENVIRONMENT

Provada is located in downtown San Francisco in a modern, high rise office building. There is building security on site 24 hours a day, 365 days a year. We are two blocks away from MUNI and BART.

Our office is fast-paced, but at the same time a low-key, friendly place to work. As a Case Manager, you will have all of the tools necessary to do an exceptional job.

SALARY AND BENEFITS

- Salary is commensurate with background and experience. We believe in paying people according to the value they bring to the organization. All team members participate in the financial success of the company.
- We offer a full-range of benefits including medical insurance, dental insurance, long-term disability insurance, life insurance, a flexible spending account, a 401(k) plan, and other incentives and opportunities one would expect from a company looking to hire the best.