M Financial Group™
Barry Evans Josephs & Snipes
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Position Specification
Client Service Analyst

General Position Description

As a member of the Client Service team, this position will ultimately be assigned a "book" of clients with a portfolio of life insurance, following a successful training period during which the candidate is expected to work closely alongside, and sometimes in support of, more senior team members. Once clients are assigned, the team member will perform activities unique to each client. Activities vary and will include basic tasks such as simply providing information, to performing highly analytical evaluation of policy performance.

Reports To: Director, Client Service

Basic Responsibilities

- Prepare materials for clients, including invoices, inventories of insurance coverage, and analytical review materials, all of which involve verifying data from multiple data sources and formatting Excel and PowerPoint reports. Much of this work is performed on a proactive basis.
- Schedule and complete ongoing/planned service to do's for new clients, based on established procedures.
- Communicate with clients (and/or their advisors) in response to impromptu inquiries in a timely fashion, serving as point person for a caseload of clients.
- Respond to ad hoc requests, such as beneficiary and ownership changes, policy changes, address changes, policy loans, death claims, etc. Assistance would include preparation of forms, correspondence, status tracking and follow up.
- Evaluate insurance policies and analyze current performance compared to benchmarked performance, applying product knowledge, awareness of the insurance industry and the general economic environment.
- Utilize company's database to reflect up-to-date data in clients' records.
- Leverage administrative support staff to improve efficiency in providing work product.
- Collaborate with other client service professionals, under the firm's "tag team" approach for key relationships, for clients assigned to colleagues. Provide assistance and share ideas in the preparation of materials to assist in their management of clients, including but not limited to the items listed above.
- Present materials to marketers in conjunction with joint client meetings,and be able to explain the logic and thought processes behind analytics and recommendations made.

Qualifications

Skills

- Intermediate to advanced Excel and PowerPoint experience.
- Excellent interpersonal skills.
- Strong verbal and written communication skills.
- Ability to identify patterns, apply logic, and draw conclusions.
- Strong follow-through skills.
- Strong attention to detail with ability to organize, prioritize, and manage multiple tasks within set deadlines.
- Comfort in asking questions.
- Ability to deal with sensitive and confidential data.
- Ability to learn complex concepts quickly.
- Ability to work both autonomously and as a team. The candidate is expected to function highly as a collaborator with other team members, working closely with others particularly during the training period.
- Ability to adhere to a peer review process for any work product, particularly those sent to a client or advisor, including the ability to accept edits and revisions to that work product.

Education/Experience

- Bachelor's degree required. No exceptions.
- Preferably three to five years of professional experience, especially favorable on experience in one of the following: life insurance, plan administration, project management, recordkeeping, corporate benefits, trust services or other financial industry experience.
- Will be expected to obtain the following licenses during employment: NC Life Insurance License, FINRA Series 6 & Series 63

Job Conditions and Environment

- Normal office environment. BEJS has a relatively small staff (<20 employees). In-town location.
- Extensive close work with databases, spreadsheets, and other documents.
- Travel to client meetings – <5% per year – local travel.
- Occasional travel to and from industry meetings for purpose of continuing education

To apply, email resume to april.lewis@bejs.com.