



Employee Benefits - Client Manager

G2 Insurance Services is seeking a candidate for the position of Client Manager to join our growing Employee Benefits team. The Client Manager provides advice and assistance requiring technical and industry knowledge in addition to high-touch client service skills to meet client needs and resolve difficulties. Working with Producers and Account Executives, Client Managers will primarily be responsible for the day to day servicing needs of an assigned book of clients.

Responsibilities:

- Act as the initial point of contact for assigned clients, carriers and others on the employee benefits team
- Ensure exposure information is accurate and submitted to carriers/marketing or clients in a timely manner
- Respond to and resolve routine client issues regarding coverage questions and/or other related issues
- Review all policies to ensure they are accurate and complete in content, are compliant with company and regulatory guidelines, and will properly respond to the client's exposures
- Ensure assigned clients files and documentation are maintained according to policy and procedures, and consistent with G2 Insurance professional standards
- Responsible to enter, update and audit all client data into EPIC, on all assigned clients
- Support Producer/Senior Account Executives on assigned book of clients including but not limited to:
 - a. Preliminary policy checking; requesting insurer corrections
 - b. Invoicing/allocations
 - c. Renewal/new business submission data gathering and preparation of applications
 - d. Proposals
 - e. Binding including transmitting to client
 - f. Insurance Summaries
 - g. Deliver/transmit policies as agreed to with Producer/Senior AE
 - h. Prepare loss and historical information summaries, if needed
 - i. Participate in marketing strategy discussions
 - j. Request and process renewals
 - k. Audit follow up and review, as applicable
 - l. Coverage comparisons
 - m. Communicate potential issues or red flags to Producer/AE (i.e. client requests plan documents or contracts)
 - n. Oversee accounting to make sure payments are received and remitted to the insurer on time
 - o. EPIC compliance
- Some face-to-face client contact
- Coordinate and/or complete special projects for clients, as needed or requested

Education & Experience

- Must possess a strong understanding of employee benefits insurance. This level of expertise is generally acquired through 3+ years of experience providing employee benefits client service while at a brokerage or carrier.
- Bachelor degree strongly preferred.
- Strong communication skills with the ability to provide non-technical explanations to technical matters, and summarize and present information in a clear, concise and accurate written and verbal format



- Strong knowledge of employee benefits insurance and carriers
- Maintain a valid unrestricted Life license in California and meet the continuing education requirements
- Proficiency with Microsoft Suite Applications, including the ability to create tables, and basic formulas
- Experience using EPIC preferred