



JOB DESCRIPTION: **Account Executive**

Capstone Administrators is an industry leader in delivering innovative technology and administrative solutions. We offer a full suite of services and state of the art software for multiple employer plans, group insurance trusts, associations and large multi-location corporation plans.

As an Account Executive, you will provide primary responsibility for the customer service, administration and relationship for a multiple employer plan(s). The Account Executive will demonstrate proven leadership relative to strategic planning, relationship management and various financial arrangements. The Account Executive meets Company standards by maintaining a positive attitude internally and externally, customer service focus, attention to detail, responsiveness and adaptability.

A strong desire to serve others is foundational in all Capstone positions.

CHARACTERISTIC JOB TASKS AND RESPONSIBILITIES

May include any and/or all the following:

- The individual is required to be a self-reliant, highly efficient and organized person with strong problem solving, communication and interpersonal skills. Ability to anticipate and meet assigned client needs in a timely and professional manner to ensure favorable relationships.
- Ability to handle client and carrier/vendor questions on a daily basis; review proposals, negotiate pricing, where appropriate.
- Proactive customer service, telephonically, through e-mail or in person, on issues such as, but not limited to, benefits review, answering questions on benefits, eligibility, claims and conducting employee meetings, etc.
- Perform customer service functions in a timely, courteous and professional manner on a day-to-day basis, to include, but not limited to: responding to customer questions, researching/investigating insurance issues and problem solving as required. Prepare reports for assigned clients, as needed.
- Maintain accurate client files and input new or amended benefits on Company computer systems. Monitor all submissions for quotes, proposals, and applications.
- Communicate in a timely, courteous and professional manner with sales consultant(s), clients, co-workers and insurance companies, to facilitate a productive environment and ensure proper administration of account(s), to include, but not limited to: rating and contract concerns, underwriting issues, claim situations, etc.
- Compile and distribute Summaries of Benefits and Coverage (SBC), Summary Plan Descriptions (SPD), Summary of Benefits (SOB), MMA Notices, Medicare Part D Notices and all other documents that may be required.
- Develop and present professional presentation materials for clients.
- Coordinate renewal, to include, but not limited to: collecting information from the client; reviewing quotes; ensuring administrative paperwork and applications are complete; submitting applications to insurance company for final rates, if needed; ordering/preparing employee packets; review contracts; policies and booklets for accuracy.
- Must meet with each member group one time each year.
- Prepare, manage and attend trustee meetings.
- Meet with a trustee each month to secure proper check signatories
- Maintain current knowledge of the marketplace.
- Other duties as may be assigned.



KNOWLEDGE, SKILLS, ABILITIES AND PERSONAL CHARACTERISTICS

- Comprehensive knowledge of employee benefit insurance products and services, wellness, strategic planning and underwriting process is required.
- Excellent organizational, multi-tasking, attention to detail and a sense of urgency follow up skills are required.
- Proficient in Microsoft Office products such as Word, Excel and Power Point.
- Able to communicate orally and in writing with others to explain complex issues, receive and interpret complex information, and respond appropriately.
- Ability to work efficiently and effectively as part of a team and/or independently.

MINIMUM QUALIFICATIONS

Education and experience equivalent to:

Four-year college degree preferred. High school/some college acceptable if supplemented with five (5) or more years of experience in increasingly responsible work involving aforementioned knowledge, skills, abilities and personal characteristics.

Life & Health License is required (or obtained within first 90 days of employment).