

Lawley

INSURANCE | EMPLOYEE BENEFITS

Captive Account Associate

These are the *fundamental* components of the job:

- Assists Captives team with evaluation/qualification of prospects as potential group captive candidates, and supports the quote/sales/documentation process for qualified candidates.
- Facilitates the renewal process for existing group captive clients, ensuring timely and accurate communication of information needed to bind coverages, and documents agency records accordingly.
- Assemble and track all client information for new business applications, proposals and quotes.
- Performs various ad hoc reports/analyses related to the performance of group captives and/or captive clients.
- Gather and reconcile new and renewal shareholder documents for processing.

Other *functions* of the job:

- Identify cross sell/up sell opportunities
- Expand and grow in your role when supporting miscellaneous duties as requested

Skills / traits that we value for this role:

- At least one-year experience in an office setting
- Interest in acquiring knowledge of insurance products; Insurance documents and usages are a plus
- MS Word and Excel proficiency are a must!
- Incredible attention to detail and organizational skills
- Ability to work well independently and on a team
- Open to continuing education, associates' degree or higher preferred
- Positive attitude, even in a fast-paced environment
- A passion to make customers and coworkers feel important and valued
- Capability to work quickly and efficiently
- Methodical, yet swift decision-making skills especially in regard to prioritization
- Precise communication skills, even under time constraints
- A desire to pursue a career in the insurance industry



'Lawley provides equal employment opportunities (EEO) to all employees and applicants for employment without regard to age, race, creed, color, religion, sex, sexual orientation, national origin, citizenship, immigration status, gender identity or expression, military status, familial status, marital status, disability or genetics.'

A bit about Lawley!

- We are not a call center environment
- We achieve success by building genuine relationships together, with our teams and clients
- We are a family owned insurance broker (70+ years!)
- We are deeply committed to the communities we serve and love to get involved
- We work hard and play hard!!!

Why Lawley?

- Competitive salary and referral bonuses!
- Expansive Benefits (Medical, Dental, Vision—and SO many more)
- 3 weeks of PTO (prorated based on start date) AND a generous holiday schedule – available 1st day!
- Company 401K contribution received starting Day 1 (for participants 21+ years old)
- Educational support, career development, and growth opportunities
- Job Security (we've never had a lay-off, even during the pandemic)
- Flexibility, including hybrid schedules! Business hours 8am-4:30pm
- Comfortable, family-oriented culture, with an emphasis on work life balance
- Unlimited Volunteer Time Off opportunities (so you can assist in serving our communities)
- Fulfilling opportunities that align with your career path and our business needs

The compensation range for this position takes many factors into consideration including but not limited to: years of experience/training, skill set, and licenses/designations. It is not typical for an individual to be hired near the top of the range for a position as circumstances and location can vary in every hiring situation. A reasonable estimate of the current range is \$33,000 to \$55,000.

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