

Lawley

INSURANCE | EMPLOYEE BENEFITS

Medicare and Individual Health Account Executive

This key role is the primary point of contact for client inquiries and supports the Medicare advisors, through service and strategic initiatives that help grow and maintain this segment of our Medicare division.

These are the *fundamental* components of the job:

- Deliver responsive, solutions-oriented support to client inquiries via phone or email, maintaining a high level of customer service excellence
- Develop, facilitate and deliver presentations for both internal and external audiences
- Schedule appointments for clients and advisors; facilitate presentations for employers and clients
- Collaborate with Medicare Advisors and team to quickly assess complex issues and deliver solution-oriented guidance
- Respond to client-driven inquiries regarding plan benefits, coverage, changes, and ensure timely communication with Advisors
- Maintain a high level of flexibility, especially during AEP, when additional duties and projects may be requested

Other *functions* of the job:

- Expand and grow in your role when supporting miscellaneous duties as requested

Skills / traits that we value for this role:

- Client facing experience in customer service or account management for 3 years or more
- Life Accident & Health License and AHIP certification, or ability to obtain in the first 90 days
- Relevant knowledge of health insurance products including Medicare & Individual Health Plans
- Demonstrate initiative by actively seeking knowledge of Medicare programs, regulations and industry changes, showing strong intellectual curiosity and a commitment to continuous learning
- Computer skills are a must, including Word, Excel, Outlook & PowerPoint. Will work with various CRM software platforms



'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.'

- Demonstrated relationship building skills and passion to make customers/coworkers feel important and valued
- Ability to work well independently and on a team
- Incredible attention to detail and organizational skills
- Capability to work quickly and efficiently. Methodical, yet swift decision-making skills

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 \$56,750 to \$101,279.75.

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