



## **Client Service Manager**

At Filice, we thrive on creating employee benefits solutions built on the idea that health makes growth possible. Filice is a part of Acrisure, a Global Top 10 Insurance Brokerage and Fintech Company, providing us with comprehensive resources and support to provide to our clients and employees. As top tier professionals dedicated to solving our clients' health and welfare insurance challenges, Filice team members deliver an unrivaled depth of service, and our unique approach enables us to help clients stay resilient and turn change into opportunity. This position is a chance to join a dynamic, expanding company with prospects for individual and career growth.

### **SUMMARY**

Responsible for collaborating with Account Executives/Benefits Consultants on the development and execution of client centered strategies. Collaborates on a book of business and contributes to the work of a multi-disciplined service team.

### **ESSENTIAL DUTIES AND RESPONSIBILITIES**

- Exhibits proven competence in all Client Service Management duties and knowledge requirements (see appendix);
- Collaborates with Account Executives/Benefits Consultant to service book-of-business;
- Exhibits competency with the Affordable Care Act (ACA) and other Benefits notices and disclosure requirements;
- Receives and responds to client inquiries including benefit and claim questions and issues;
- Reviews client coverage contracts and amendments for accuracy;
- Promotes professional image of Filice (both internal and external);
- Acts as liaison between client and carrier;
- Manages and negotiates third party vendor relationships and contracts on behalf of the client;
- Complies with agency management system data standards and data integrity (enters and maintains complete and accurate information);
- Develop employee memorandum drafts and Benefits Booklets for clients to communicate the following: annual renewal changes, enrollment procedures, miscellaneous benefit changes and/or clarifications;
- Install new group insurance contracts for existing clients or new clients, effectively utilizing resources to match client needs;
- Gather documents required to prepare annual 5500 filings if applicable and ensure submission in a timely manner. Provide summary annual reports for clients;
- As directed by Benefits Consultant, conduct employee meetings at Open Enrollment and other appropriate times;
- Other duties as assigned.



## **QUALIFICATIONS**

### **EDUCATION / EXPERIENCE**

- Bachelor's degree or equivalent combination of education and experience
- 5+ years related work experience
- Valid insurance license
- Must continue to meet Continuing Education requirements for license renewal
- Baseline understanding of self-insurance and alternative funding arrangements
- High level of Employee Benefits product and benefit administration knowledge

### **SKILLS**

- Excellent verbal and written communication skills
- Excellent customer service skills, including telephone and listening skills
- Great leadership, problem solving and time management skills
- Good presentation skills and ability to conduct open enrollment meetings
- High attention to detail
- Ability to prioritize work for multiple projects and deadlines
- Ability to work within a team and to foster teamwork
- Proficient in Microsoft Office Suite

We are proud to provide comprehensive, high quality employee programs to meet employees' needs now and in the future, including a very competitive financial package. We encourage you to explore what we have to offer.

Filice is an equal opportunity employer. All qualified applicants will receive consideration for employment and will not be discriminated against on the basis of race, color, age, religion, gender, sexual orientation, gender identity, national origin, disability, protected veteran status or any other protected status.

If you are applying for a job and need a reasonable accommodation for any part of the employment process, please contact us.

### **Appendix:**

Client Service Management Duties:

- Maintain open and clear communication channels with clients, producers and internal partners.
- Communicate due dates, timelines and expectations to clients and partners to ensure smooth transitions and implementation of benefits.
- Identify problems, summarize and develop strategic solutions.



- Install new group insurance contracts for existing clients or new clients, effectively utilizing resources to match client needs.
- Administer annual renewals including preparing proposals if appropriate and communicating any contractual changes to the clients and carriers.
- As directed by Benefits Consultant, conduct employee meetings at Open Enrollment and other appropriate times.
- Gather documents required to prepare annual 5500 filings if applicable and ensure submission in a timely manner. Provide summary annual reports for clients.
- Inform clients of ERISA, COBRA, FMLA/CFRA and other leaves, and other benefits compliance measures. Review and assist clients to complete the Benefits Disclosure Compliance calendar annually.
- Develop employee memorandum drafts and Benefits Booklets for clients to communicate the following: annual renewal changes, enrollment procedures, miscellaneous benefit changes and/or clarifications.
- Develop and maintain excellent carrier relationships. Assist client/employee with unresolved benefits matters, including eligibility and claims issues.
- Remain informed regarding industry information and new product information.
- Expected to further industry education through insurance coursework
- Other assigned duties

**Pay Range: \$70K-\$130k, plus bonus**

**By signing below, you accept the above duties and tasks.**

**Candidate Signature:** \_\_\_\_\_