

Account Manager – Benefits Team

Ancora Insurance Solutions, a large regional brokerage firm, is seeking an Account Manager to support our Benefits Team. The primary focus of this role is to manage the commercial clients in our small to mid-size market.

Location

This position is located at Ancora's Cleveland (Westlake), Ohio, office.

Duties & Responsibilities

Provide High-Quality Service to Clients

- › Professionally respond to client calls and emails. Interact with multiple parties at the client level including executives, HR representatives and their employees
- › Process insurance applications (member, employer, etc.)
- › Process benefits claims resolutions and provide explanation at the client level
- › Document and maintain historical information for the client and Ancora
- › Provide the client with tools for their employee communications including payroll stuffers, employee handbooks, benefit handouts, etc.
- › Problem solving and decision-making activities associated with the client

Management of Renewal Process

- › Assist with the strategy and oversight of the renewal process from beginning to end (market analysis, current/renewal carrier information, analyzing market trends, etc.)
- › Coordinate with the appropriate internal producer to assure all information is documented
- › Track, document and create renewal packets
- › Secure renewal information, plan design options and associated costs from insurance carriers
- › Participate in the negotiation process with carrier partners
- › Utilize Excel to manage the financial steps related to renewal process (numerical data, manipulation of document, formatting worksheets, etc.)

Client and Group Presentations

- › Day-to-day communication benefits and claim resolution at the carrier and client level
- › Documentation of appropriate communications to the client level
- › Open enrollment meetings performed annually at the client level
- › Frequent face-to-face meetings at the client's HR/executive level

Revenue Generation for Benefits team

- › Actively participate in the annual client renewal process with Ancora's internal producer
- › Document and pursue identified cross-selling opportunities
- › Generate referral base through client relationships

Qualifications

- › Bachelor's degree preferred (or any combination of education and work experience, which provide an equivalent background)
- › 3-5 years of work-related experience as a service or account manager
- › Proficient Microsoft Office skills (Word, Excel, PowerPoint)
- › Underwriting knowledge and technical skills
- › Knowledge of FormFire platform
- › Demonstrated communication and presentation skills, specifically in both personal and group settings
- › Knowledge of the insurance market and the ability to get to the right channel for results and resolution
- › High degree of organizational skills, accountability, accuracy, competence and attention to detail with ability to multi-task
- › Professional appearance and demeanor
- › Team-oriented

Benefits

Ancora offers a competitive salary and excellent benefit package with a culture of teamwork and recognition.

About Ancora

Ancora is client-focused and growth-oriented investment and financial advisory firm based in Cleveland, Ohio. The Firm is recognized for providing investment advisory, money management, insurance and retirement plan advisory services to individuals and institutions. Ancora promotes a friendly, family-oriented work environment and encourages our employees to strive for personal and professional growth with the highest level of integrity.

Ancora is an Equal Opportunity Employer

All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, national origin, protected veteran status, disability, or any other basis protected by applicable law.

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