

Operations Manager, Insurance Planning

Ancora is looking to hire an Operations Manager who is responsible for the seamless execution of the life insurance group's business cycle—from initial case submission to final policy allocation and commission accounting. This role serves as the connective tissue between the finance team, advisors and the operational support of the insurance team. The incumbent will oversee workflow optimization, maintain compliance standards (Series 24) and provide data-driven insights to improve the group's placement ratios and efficiency.

Location

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

Duties & Responsibilities

Process Management and Leadership

- › Directly oversee and mentor the Case Manager and Customer Service Representative (CSR) to ensure high performance and professional growth.
- › Constantly evaluate, manage and improve internal processes to reduce friction and increase speed-to-market.
- › Develop and maintain a standardized process for tracking underwriting and new business status to ensure no case falls through the cracks.
- › Partner with other members of the insurance team to maximize client service efficiency and enhance the overall insurance process.

Compliance

- › Serve as the primary point of contact for internal suitability with compliance department. Must hold or be willing to obtain a Series 24 license.
- › Oversee the tracking and storage of internal suitability documents and variable applications, ensuring timely delivery to the compliance department.
- › Facilitate the pre-filling of compliance forms.
- › Ensure all new policies are accurately allocated and accounted for upon issuance.

Oversight and Reporting

- › Coordinate with the Finance team and Producers on SmartOffice commission accounting
- › Generate and present reports on key performance indicators (KPIs).

Qualifications

- › Bachelor's Degree or higher education, required
- › Life & Health Insurance license and certifications, required
- › FINRA Series 6 License, required
- › Have or will obtain FINRA Series 24 License
- › 3+ years of life insurance experience, preferred
- › Proficiency in Microsoft Office Suite (Word, Excel, PowerPoint, Outlook)
- › Familiarity with insurance-specific software such as Ensignt, WinFlex Web, Vital Term, iPipeline, SmartOffice, Proformex and carrier quoting software

- › Strong verbal and written communication skills, with the ability to collaborate across all levels of the organization
- › Strong presentation skills, with the ability to present to small or large groups on complicated advanced planning topics
- › High degree of organization, accuracy, and attention to detail
- › Ability to multi-task and manage priorities in a fast-paced environment
- › Effective problem-solving, time management, and project management skills
- › Strong work ethic, with the ability to work independently and follow procedures
- › Personable, approachable, and positive attitude in delivering service excellence

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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