

## Insurance Services & Operations Professional

Ancora is seeking a life insurance operations and service professional to manage and oversee insurance policy servicing and operational processes for individuals, families and businesses. The incumbent will serve as a key liaison among clients, carriers, advisors and internal teams to ensure applications and policy servicing matters are handled accurately and efficiently. While primary responsibility for underwriting coordination resides with the Case Manager, this role provides support and backup as needed to maintain continuity and ensure a seamless client experience. In addition, the incumbent will support ongoing policy administration, helping ensure coverage remains aligned with clients' evolving financial, tax and estate planning strategies.

### Location

This position is located at Ancora's Cleveland (Mayfield Heights), Ohio, office. No remote option.

### Duties & Responsibilities

#### Policy Management & Client Service

- › Manage client service requests, including policy changes, beneficiary updates, investment reallocations and premium adjustments.
- › Coordinate with carriers to obtain required documentation such as illustrations, cost basis information and premium histories.
- › Proactively monitor upcoming premiums and reach out to clients to prevent policy lapses.
- › Monitor the Ancora insurance inbox, ensuring timely responses to client and partner inquiries.
- › Maintain accurate policy records and documentation within internal systems.

#### Internal Systems & Process Improvement

- › Support and enhance SmartOffice CRM functionality to improve case tracking, reporting, and policy servicing workflows.
- › Identify and implement process improvements to enhance service delivery.
- › Develop and maintain standardized procedures to promote consistency and operational excellence.

#### Internal Relationships & Collaboration

- › Partner closely with the Case Manager and broader insurance team to support new business processing and ongoing client engagements.
- › Serve as a primary resource for wealth advisors regarding policy servicing, premium monitoring and insurance summaries.
- › Provide timely updates and clear communication to advisors regarding application status and servicing matters.
- › Support integration of insurance planning within broader wealth management strategies.

### Qualifications

- › High School Diploma, required, or Bachelor's Degree, preferred
- › Life & Health Insurance license and certifications, preferred
- › 3+ years of life insurance experience, preferred
- › 3+ years of experience in customer service and operations, preferred

- › Proficiency in Microsoft Office Suite (Word, Excel, PowerPoint, Outlook)
- › Experience working with Insurance software such as Proformex, SURELC, SmartOffice, iPipeline and DocuSign, preferred.
- › Strong verbal and written communication skills, with the ability to collaborate across all levels of the organization
- › 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.

Visit [www.ancora.net](http://www.ancora.net) for more information.

## Apply

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