



Service Representative

Copic Job Description

JOB OVERVIEW

JOB TITLE	Service Representative
DEPARTMENT	Copic Financial
FLSA CLASSIFICATION	Non-exempt
REPORTS TO	Sr. Financial Planner

JOB SUMMARY

Process and manage new life, disability insurance and mutual fund applications. Prepare life and disability insurance quotes and assist in the preparation of sales proposals and presentations. Handle customer service, client scheduling, and underwriting related phone calls. Assist with various administrative support duties. Contact existing and new clients to market and sell life and disability insurance, review coverages, and access client's other insurance needs. Market and promote life and disability programs.

KEY RESPONSIBILITIES

➤ Processing of New Business

Percent of Time: 60%

- Prepare and obtain needed insurance and investment related proposals for producer. Review applications for accuracy and submit to appropriate insurance company. Verify underwriting requirements via insurance company underwriting guides or by calling the company to confirm. Order any medical requirements with EMSI. Assist the insurance companies in obtaining APS/medical records. Relay any additional requirements from the insurance company to the agent. Review policies received from the company for accuracy and get delivery requirements back to the insurance company.

➤ Internal & External Sales

Percent of Time: 20%

- Contact new Copic physicians to market Copic Financial and sell life and disability insurance programs. Contact Producer's existing clients on annual basis to update their records, review coverages, and access client's other insurance/financial needs. Follow up on disability updates (BU's and AIO's) and be responsible for the persistency of the DI block of business. Create opportunities to work together with producer to identify and implement cross-selling opportunities for producer or other coverage's by utilizing other Copic specialists. Participate in helping Copic Financial and Copic at sponsored exhibitor booths to promote Copic Financial.

KEY RESPONSIBILITIES CONTINUED...

➤ Administrative Duties

Percent of Time: 15%

- Take calls from clients and answer any questions they might have concerning their policies with Copic Financial. Keep database up to date regarding policy and client information. Perform administrative duties such as preparing marketing/service letters, doing mailings and other service-related functions as requested by producer/director. Contact insurance and investment companies with policy and account changes.
- Provide general office support as needed, including opening mail; phone back-up; filing; greeting clients and other miscellaneous functions. Maintaining compliance files, bolstering mutual fund trades, and tracking new production.

➤ Compliance Management

Percent of Time: 5%

- Execute and blotter transactions within mutual fund accounts. Submit compliance related information to Broker-Dealer/NASD, SEC, Dept of Insurance, as well as, helping with contracting for self and producer with various companies.

REQUIRED QUALIFICATIONS & SKILLS

- Bachelor's degree in a related field.
- 2-5 years experience working in the insurance and/or financial services industry.
- Overall knowledge of Microsoft Office Products including Word, Excel, PowerPoint and database management.
- Solid knowledge of life, disability insurance and financial services.
- Must be fully licensed in all lines of insurance in which products will be sold.
- Excellent written and verbal communication skills
- Excellent customer service & phone skills
- Ability to calmly prioritize needs.
- Good organizational skills and the ability to coordinate and monitor various projects.
- Works well under pressure and heavy deadlines.
- Promotes a positive organizational image to the internal and external community.
- Ability to develop a good working relationship with sales staff and external clients.
- Self-motivation and the flexibility to handle an independent work environment

DESIRED QUALIFICATIONS & SKILLS

- Life Insurance License
- Securities License: Series 6/63 or Series 7

WORKING CONDITIONS

- Typical Office Environment
- Hybrid Schedule. Office located in Denver, Colorado
- Travel up to 50%, mostly in-state by car
- Schedule
 - Full-Time, 40 hours per week, long or unusual hours as needed, sometimes on short notice
 - Business Hours: 8am-5pm

About Copic

Copic's mission is to improve medicine in the communities we serve. We strive to be the premier diversified service organization providing professional liability insurance and other needs of the health care community through advocacy, innovation, and the commitment and dedication of our employees.

We offer competitive wages, a comprehensive and highly sought-after benefits package, and a great work environment with fun, friendly people who truly enjoy their work. Hiring range for this position is \$49,137.40/annually to \$61,421.75/annually.

Disclaimer: *This is not meant to be comprehensive. Job duties and/or qualifications are subject to change depending on business need.*