



Policy Issuance Specialist

Job Summary: The primary responsibilities are to issue Stop Loss policy forms, validate producer licensing, and assist in the onboarding of new clients.

Supervisory Responsibilities: None

Duties/Responsibilities:

- Sold Case Processing
 - Process sold cases for new business and renewals
 - Work collaboratively with underwriting to confirm sold terms
- Producer Licensing
 - Request current licenses for broker agencies and individual producers
 - Request carrier appointments
 - Maintain broker database
- Policy Issuance
 - Prepare policy forms and deliver to clients
 - Work with brokers to gather information needed for onboarding new cases
 - Maintain procedures for each client
 - Aid in the creation of policy issuance procedures for new clients
- Other
 - Request renewal of RFP submissions
 - Work collaboratively with underwriting, finance, and claim departments to resolve issues
 - Mentor and train new team members
 - Assist in department projects

Required skills/abilities:

- Proficient in Word and Excel
- Critical and analytical skills
- Accuracy
- Strong written and verbal communication skills
- Ability to work in an agile environment
- Professionalism and respect towards coworkers and clients
- Confidence in decision making

- Strong time management skills
- Ability to work independently

Education/Experience:

- Stop Loss Insurance background required
- Bachelor's degree preferred, or at least 3 years in field