

## Benefits Service Agent

Organization Name: Pelnik Insurance

Website: [www.pelnik.com](http://www.pelnik.com)

Contact: Brenda Atwood at [Brenda.Atwood@Pelnik.com](mailto:Brenda.Atwood@Pelnik.com) or 919-459-8011.

About us: Pelnik Insurance is the largest privately-owned agency in Cary, NC. We strive to provide top tier service for each of our customers and we do that by attracting the top producers, advisors and service agents to our team. Over 5 times named TBJ Best Places to Work winner, Pelnik provides our team with industry best benefits and extensive professional education.

General: The full-time Benefits Service Agent position is primarily an internal position and assists producers, other service agents, and customers in day-to-day servicing. The Benefits Services Agent handles service issues for small to medium size clients with minimal assistance and aids our producers on larger account. The candidate for this position meets agency standards and is expected to maintain a positive attitude, express enthusiasm and be flexible.

### Primary Duties:

- Assist producers with submission of RFP to market and follow up for requested quotes.
- Review all quotes for accuracy and prepare initial draft of comparative analysis for review by Producer.
- Review applications for accuracy and completeness and forward to carriers with appropriate documentation.
- Monitor all submissions for quotes, proposals, and applications until all material for customer and agency commission are received.
- Solve majority of client service issues; share serious problems with Producer and work together to decide appropriate action.
- Maintain basic current knowledge of the marketplace.
- Provide day-to-day customer service by phone, in-office, emails, etc.
- Set up and maintain customer records according to agency standards.
- Respond to client requests per agency guidelines.
- Handle open follow-ups/activities with daily review.
- Serve as liaison between the customer and the carrier by assisting with resolving any claim problems and billing inquiries.

- Other duties as may be assigned.

Education, Experience & Aptitudes:

- Minimum 1-2 years' experience
- Bachelor's degree; or combined equivalent years of experience and education.
- NC Health & Life license.
- CEBS, PHR, RHU or REBC certifications preferred but not required.
- Great organizational, verbal and written communication skills.
- Able to communicate orally and in writing with others to explain complex issues, receive and interpret complex information, and respond appropriately.
- Proficient in Microsoft Office products such as Word, Excel, and Outlook.
- Fully understands computer programs and utilizes programs per agency standards.
- Able to work with minimal supervision and function as part of a team.
- Problem Solver.