**Client Services Representative**

**Job Description**

**WHO WE ARE**: Employee Benefits consultants passionate about exceeding client expectations and delivering service excellence. Our unique philosophy has allowed us to become one of the premier employee benefits agencies in Southern California. We are looking for more Super Stars to help us manage our explosive growth. A Client Services Representative that shows potential can grow into an Account Manager position.

**DESCRIPTION**: An incredible opportunity for a Client Services Representative with superior technical, organizational and communication skills who wants to be part of an elite professional team. If you think that you can handle a significant volume of work accurately and efficiently, we would like to meet you. The ideal candidate will have a strong background in employee benefits and the ability to develop an excellent rapport with the Account Management Team. Project management and multi-tasking skills are crucial components of this position. This position is expected to provide prompt, accurate, and courteous support service to clients and coworkers.

**ESSENTIAL RESPONSIBILITIES:**

* Assists Account Management Team with day to day administrative needs, such as claims and billing resolution, and other service related items
* Responsible for processing eligibility transactions (enrollments, terminations, changes)
* Performs billing audits and reconciliation
* Assists with all facets of new group plan installation
* Assists with development of renewal timeline
* Responsible for development and coordination of employee communication materials and material orders
* Assists with organizing client health expos and wellness events
* Processes incoming Broker of Record letters, gathers new client benefit information, adds policy and commission structure to agency management system
* Prepares client mailings, including birthday/holiday cards
* Manages license renewals and carrier appointments
* Assists with monthly client e-newsletters and other communication
* Schedules and coordinates internal and external meetings

**ABILITIES / SKILLS**

* High school diploma or equivalent
* Minimum 1 year of experience in the employee benefits industry
* Minimum 2 year of business experience in a fast paced office environment
* Excellent communication skills with the ability to provide clear, concise and accurate information in a written and verbal format
* Strong organizational skills with the ability to prioritize projects according to deadlines and urgency
* Strong work ethic to consistently exceed expectations and over-deliver on promises
* Must be able to work independently and in a team environment
* Flexibility, willing to “wear many hats” and assist team members in any other capacity relating to client services
* Knowledge and proficiency of Outlook, Word, Excel and PowerPoint
* Knowledge of Gen4 Systems a plus