



## Job Title: Account Manager

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### **Primary Role:**

The Account Manager is responsible for managing and supporting a designated block of accounts. Through strategic collaboration, this position is key to the proactive execution and delivery of results positively impacting the client experience. This role is responsible, accountable, inclusive and understands individual daily actions make an impact on overall success.

### **Key Accountabilities:**

- Handle day-to-day account management responsibilities in a proactive and timely manner ensuring client needs are met
- Collaborate with internal team members to deliver an exceptional client experience
- Coordinate client meeting logistics throughout the year and document notes/actionable items
- Responsible for the preparation of materials, presentations, reports and other identified deliverables for client meetings
- Facilitate service level requests to the Solutions Team clearly and effectively
- Manage policy renewals
  - Initiate proactive renewal review
  - Establish and maintain renewal timelines
  - Assist with renewal negotiation
  - Ensure consistent and thorough delivery
- Create financial analysis spreadsheets to clearly and accurately compare benefit options
- Request and prepare quoted benefit options from carriers
- Request, review, and deliver plan level reporting data to appropriate contacts on a monthly, quarterly, and annual basis as required
- Track and effectively document workflow via CRM policies, activities, and case management
- Stay current on industry standards, trends, and products
- Build and maintain carrier relationships with an understanding of current product portfolios
- Act as a liaison for the client/carrier relationship
- Assist with monitoring plans to ensure compliance with federal and state laws including but not limited to HIPAA, ERISA, COBRA, FMLA and the Affordable Care Act

JA Benefits is a client focused benefit consulting firm providing clear, simplified solutions to complex business issues. Our clients come first and we strive to exceed their expectations on a daily basis. Account Managers take pride in their work, each other, and our clients. They understand we own and drive the client experience; each employee does whatever it takes to build and strengthen our relationships by providing exceptional level service and support to colleagues, our clients, and their employees.

**Qualifications:**

- Bachelor's degree in business-related field preferred, and/or equivalent experience
- 3-5 years of work experience with proven benefits knowledge
- A self-starter with initiative and strong customer/client orientation; ability to facilitate discussions to resolve issues, obtain consensus, and drive to conclusion
- Knowledge of and familiarity with current Health, Life, Dental, Vision, Long Term Disability (LTD), Short Term Disability (STD) and additional ancillary products
- Knowledge of and familiarity with federal and state benefit regulations
- Must have a high level of organization, emphasis on multi-tasking, and ability to manage multiple projects on a simultaneous basis
- Must have high degree of respect for confidentiality
- Ability to earn and maintain client trust along with excellent relationship management skills
- Ability to work collaboratively and effectively as part of a team
- Ability to run and/or participate in an effective meeting, using listening, reasoning and articulate communication skills
- Must hold (or is actively pursuing) professional designation and must hold State insurance license

JA Benefits, LLC is an equal opportunity employer. As a privately held company, we offer a competitive compensation and benefits package reflecting our commitment to attracting and retaining great individuals. The benefit package includes health, dental and vision coverage, employer-paid short-term and long-term disability, and basic life insurance as well as 401(k) with match.

To apply, please send your resume and a cover sheet to [hr@jabenefits.com](mailto:hr@jabenefits.com).