

## Hermann Sons Life

515 S. St. Mary's St., San Antonio, TX 78205

### Member Services Representative

Job Description

#### Position:

Member Services Representatives are responsible for providing exceptional customer and policy service to our members, agents and home office staff via telephone, correspondence and personal contact. A wide variety of certificate change requests and payments are processed through the Member Services Department. It is essential that customer concerns and requests be tended to timely, adequately and compassionately.

#### Primary Duties and Responsibilities:

- Field inquiries regarding general certificate information.
- Process transactional certificate requests such as, but not limited to:
  - Surrender requests
  - Beneficiary changes
  - Lodge transfers
  - Ownership changes
  - Lost certificate request
  - Name changes
  - Contact information changes
- Manage member, owner and payor correspondence regarding policy values.
- Provide general policy information to members.
- Guide and educate members requesting surrender of their policy.
- Assist with incoming and outgoing mail.
- Back-up for other Member Services Department duties and Reception staff.
- Perform any and all other duties as assigned by the Vice President of Operations and COO.

#### Qualifications:

- Life insurance customer service experience a plus.
- Must be proficient in standard Office software.
- Excellent time management capabilities.
- Exemplary math skills and solid attention to detail are essential.
- Strong written and verbal communications skills.
- Self-motivated with the ability to work well with others.
- Outstanding customer service capabilities.
- Ability to prioritize work and meet necessary deadlines.
- Sensitivity to confidential matters.
- Flexible with technological upgrades and changes.
- Stable job history.
- Clean background check required.

#### Employment Specifics:

This is a full-time, non-exempt position with applicable benefits. Regular office hours are Monday through Friday 8:00 a.m. to 4:30 p.m.