

Hermann Sons Life

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

Underwriting Support Staff

Job Description

Position:

Underwriting Support Staff are an integral part of the life insurance underwriting process. They are responsible for providing exceptional service to our customers, agents, home office staff and vendors via telephone, written correspondence and personal contact. It is essential that files and requests be tended to timely, adequately and compassionately. All life insurance new business applications are processed through the Underwriting Department. Underwriting Department employees report directly to the Vice President of Operations and COO.

Primary Duties and Responsibilities:

- Complete underwriting worksheet, set-up and key new business applications.
- Run Medical Information Bureau (MIB) report, prescription check, order paramedical exams and inspections and obtain any other necessary reports on incoming applications in accordance with Hermann Sons Life's underwriting guidelines.
- Upload applications and supporting documents to the TPA Underwriting Service.
- Provide any necessary support for TPA Underwriting Service as requested.
- Follow up on all pending applications by contacting agent or vendors for information regarding status.
- Request and follow up on attending physician reports.
- Remain in contact with agents regarding application status and outstanding file requirements.
- Manage file room maintenance.
- Scan all life insurance new business files, surrenders, active files and any other necessary documents.
- Post payments on life insurance new business applications and process daily department deposit.
- Issue, proof, print and assemble new policies.
- Handle and research returned mail and address change requests.
- Back-up for reception.
- Perform any and all other duties as assigned by the Vice President of Operations and COO.

Qualifications:

- Must be proficient in standard Office software and have the ability to navigate various vendor portals.
- 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.
- Ability to prioritize work and meet necessary deadlines.
- Sensitivity to confidential matters.
- Stable job history and 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.