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Job Title

Asset Reporting Analyst

Company

Confidential

Location

Plano, TX

Job Type

Full-Time

Salary

\$55,000 - \$58,000 plus bonus

Industry

Executive Benefits/Insurance

About the Company

Our client is a small, privately owned company with over 10 years of experience in providing credit unions and businesses with simple and complex benefit and incentive programs to help them attract and retain qualified executives. Client has worked with financial institutions throughout the country and is rapidly growing. The company's core values are to provide excellence in an ethical manner with a positive attitude. Teamwork is emphasized and the company takes an interest in the personal growth of its employees.

Job Description

The Asset Reporting Analyst will be responsible to develop and maintain key relationships with Consultants and Insurance Carriers to ensure reporting requirements and requests for information are completed in a timely and accurate manner.

Responsibilities

- Proactively download monthly policy values/data from insurance carriers via email or portal for assigned book of clients.
- Review the policy values/data for accuracy and ensure that they include all the required data for that specific report.
- Load policy values/data into the SQL Database, saving in accordance with BCC's filing conventions.
- Prepare financial and utilization reports (based on the policy values) to be used in monthly/quarterly experience reports, annual forecasting (renewals) and any ad-hoc analysis for fully-insured clients.
- Assist Consultants with preparing financial and utilization reports for large/self-insured clients.
- Stay up-to-date with the latest developments, trends and regulations in the employee benefits market place.



- Build and maintain solid relationships with insurance carriers and consultants.
- Maintains client data within Salesforce.
- Works independently to manage assigned workload and identify product and values related issues requiring additional attention, and work independently to resolve.
- Meet servicing deadlines outlined on the Service Timeline.
- Will communicate issues to internal associates and work with carrier to resolve discrepancies.
- Will serve as a resource for other team members and assist with insurance related questions or issues.
- Work in a team environment building partnerships across all departments at BCC.
- Other duties as required.

Experience and Qualifications

The ideal candidate for this position would be someone with customer service or equivalent experience who is highly organized and an articulate communicator who is also a critical and creative thinker.

- Strong knowledge of Microsoft Excel.
- Working knowledge of the group insurance marketplace is preferred but not required.
- Advanced knowledge of accounting and finance concepts.
- Excellent oral and written communication skills.
- Advanced knowledge in Word, Outlook and Salesforce.
- Bachelor's degree preferred or equivalent, relevant experience.
- 2 -5 years of experience with a professional firm, preferably in a consulting environment.
- Experience or exposure to banking or financial industries is preferred.

