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Job Title

Insurance Underwriter

Company

Confidential

Location

New York Metro Area

Job Type

Full-Time

Salary

\$60,000 - \$70,000

Industry

Financial Services / Wealth Management

About the Company

A Wealth Management firm that works with families and businesses to help them execute and maintain their financial goals throughout their lifetime and for future generations. The firm offers planning services, insurance and investments.

Responsibilities

- Evaluate financial and utilization metrics for clients including but not limited to; monthly financial reports, utilization metrics, pre-renewal calculations, stop loss pricing and carrier renewal formulas
- Prepare and recommend plan changes and/or alternative funding recommendations.
- Monitor, prepare and send monthly financial reports to clients with analysis of activity and large claim detail.
- Prepare utilization analyses in accordance with client service calendar financial meetings (e.g. post renewal, mid-year review, pre-renewal, renewal).
- Complete technical analysis of group insurance contracts and financial funding arrangements (e.g. fully insured vs self-funded).
- Conduct multi-year analysis to develop alternative strategies, plan modeling and cost reduction opportunities.
- Prepare financial projections, large claims analysis, specific stop loss analysis, claim trends, IBNR and claims lag analysis to forecast exposure.
- Be available for client meetings to deliver and discuss customer financial implications of analysis.
- Identify and articulate trends and relationships of experience to renewal rating, while providing suggestions and recommendations based on findings from experience data.



- Partner with sales teams, Account Managers and Account Executives to develop strategic and proactive solutions for clients and prospects, including but not limited to; building templates, exhibits and sales presentations.

Experience and Qualifications

- Bachelor's degree.
- Minimum 2-3 years of experience in Insurance Underwriting.
- Strong functional knowledge of Excel, MS Office products to include Word and PowerPoint particularly in creating, formatting and evaluating formulas and working with templates.
- Active Life and Health Brokers License, preferred.