

**GENERAL INSURANCE SERVICES, INC.**

**JOB DESCRIPTION**

**Job Description: Financial Services Relationship Manager**

**Reports to: Wendy Loehr**

**FLSA Status: Part-time**

**Approved by: Joe Biernacki**

**Date Approved: 07/05/2022**

**Purpose: The Financial Services Relationship Manager communicates clearly with all coworkers and clients, and processes all related documents to provide timely and accurate service to clients and advisor as directed.**

**Responsibilities:**

- 1. Ensure client satisfaction, growth and retention of business by providing top quality service and problem solving.**
  - a. Ability to field simple client questions by telephone.**
  - b. Complete forms accurately for client signature and file in document management.**
  - c. Provide stellar customer service to our clients and be informed on all company policy and practices (including data privacy)**
  - d. Accept payments, direct deposit to client account or overnight mail to NFS and upload to document management system.**
  
- 2. Assist advisor and office with day-to-day functioning.**
  - a. Respond to incoming calls, voicemail and emails from clients, ideally within the same day.**
  - b. Populate and maintain CRM.**
  - c. Set appointments for Financial Advisor.**
  - d. Participate in select client meetings to take notes and collect documents as directed.**
  - e. Prepare packets for surge months.**
  - f. Process all incoming mail. Scan to client's file and correspond as appropriate.**
  - g. Assist advisor by work processing/printing correspondence, as requested.**
  - h. Provide regular front desk coverage relief.**
  
- 3. Perform related duties as assigned.**

## **Knowledge, skills and abilities:**

- 1. Registered as an assistant with ESI.**
- 2. Previous experience in financial services preferred; the ability to read with good comprehension and precise mathematical skills and an understanding of business and marketing.**
- 3. Indiana Life & Health agent's license is required (can be obtained while employed).**
- 4. Complete continuing education courses as required to maintain Indiana Life & Health license (renews every 2 years)**
- 5. The ability to deftly access all company websites to prepare quotes for life, health and long-term care. Empathic listening skills and careful speaking skills.**
- 6. A thorough knowledge of the phone system, including the ability to transfer calls and conference call.**
- 7. The ability to use Outlook to send and receive emails including attachments.**
- 8. The ability to utilize the in-house software systems within 60 days of employment. These skills include using the Genifax, scanning and attaching appropriate items in CRM and/or document management system.**
- 9. Ability to effectively communicate orally and in writing with co-workers, other companies, and members of the public, including being sensitive to professional ethics, gender, cultural diversities, and disabilities.**
- 10. Ability to work alone with minimal supervision and with others in a team environment, occasionally under time pressure, and on several tasks at the same time.**

## **Physical Demands and Working Conditions**

- Face-to-face and telephone communication requires an ability to express oneself as well as perceive and exchange ideas.**
- Viewing computer terminal, perceiving and transcribing data with accuracy and keyboarding fill much of the day in an office environment.**
- The employee is not exposed to adverse environmental conditions, working primarily in an office environment.**
- The employee is expected to independently transport self to meetings with clients and prospects in other GIS offices as well as to activities outside the office.**
- Light work. Exerting up to 20 pounds of force occasionally and/or negligible amount of force. Work can require walking while carrying objects, stooping, kneeling, crouching, as well as grasping objects, and reaching with hands and arms.**
- The employee is occasionally required to stand, walk, and climb stairs.**

**I have reviewed this job description for the Financial Services Relationship Manager with my supervisor. By signing below, the employee acknowledges that they are aware of the scope, responsibilities, and requirements of this position.**

**Employee's Signature: \_\_\_\_\_ Date: \_\_\_\_\_**

**Supervisor's Signature: \_\_\_\_\_ Date: \_\_\_\_\_**