



Employee Benefits Underwriting Financial Analyst

Overview

Independence Underwriting Partners is currently looking to fill the position of Employee Benefits Underwriting Financial Analyst. We are looking for motivated and self-driven employees who want a career for the long haul. The Employee Benefits Underwriting Financial Analyst works with IUP and our partners in providing thorough financial and marketing analysis to meet the financial needs of clients.

Essential Functions

- The EB Underwriter Analyst will perform basic cost projections by entering the client's cost and enrollment data into excel.
- Analyze vendor renewals by checking carrier or vendor's plan rates based on claims and enrollment data, trend rates, administrative expenses and other charges
- Prepare and solicit RFPs for all lines of coverage
- Prepare presentations of all quotes within 5-days before the client meeting
- Finalize client presentation of marketing results using all the Montage methods
- Peer review renewals, RFPs, presentations with the AE, AM, Director of Department and team before documents are sent to market or finalized for client
- Analyze RFP marketing results onto excel spreadsheet for clients
- Prepare quarterly and annual financial reports for experience reports for clients
- Enhance client-facing materials (reports, censuses, custom documents)
- Prepare Stewardship Reports
- Prepare Benchmark Reports

Qualifications

- 2-3 years experience with Health & Welfare Plans
- Direct experience working for insurance broker/agency or carrier
- Strong analytical and mathematical skills
- Strong command of Excel
- Excellent interpersonal skills; strong oral and written communication skills
- Ability to prioritize and handle multiple tasks in a demanding, fast paced work environment
- Experience with mid-size to large employer groups
- Experience with self-insurance funding arrangement
- Working knowledge of Stop Loss market and contracts
- Ability to interact with all levels of staff, vendors and clients
- Organized and detailed oriented
- Personable with a strong work ethic
- Must be a conscientious team player
- Intermediate to advanced knowledge of MS Office products including PowerPoint, Word, Excel, Outlook
- Internet savvy



Preferred Qualifications/Skills

- Bachelor's degree in a related field (i.e. Actuarial Science, Mathematics, Finance, Accounting)
- Current Health & Life License

Position Type/Expected Hours of Work

- This is a full-time position. Standard office hours are 8:00 AM – 5:00 PM, Monday – Friday with some requirements to start earlier or stay later only as needed
- Salary details shared upon request

Please email your resume and contact information to HR@iupllc.com