



## Health Agent - Individual and Medicare

**Position:** Health Agent – Individual and Medicare

**Location/ Department:** Individual Benefits/PFI Operations

**Supervisor Name and Title:** Vice President of Operations

**Supervises (Number of employees supervised):** 0

**FLSA Status:** Exempt (exempt from overtime)

Non-Exempt (non-exempt from overtime)

### Job Summary:

The Health Agent-Individual and Medicare generates revenue through the sales of Individual Health insurance products. Sales-focused position requiring advanced communication skills and a thorough knowledge of insurance products. Capable of pursuing and closing sales for new and existing Individual Benefits accounts.

The Health Agent-Individual and Medicare is expected to have excellent attendance and communication skills, possess the ability to build lasting business relationships, and exhibit professionalism.

### Job Duties and Responsibilities:

- Prospect new business primarily by phone, mail, referral or other marketing and lead generation techniques for identified target groups in accordance with agency guidelines
- Follow up on referrals provided by agency team within designated time frame
- Develop and convey formal proposals of insurance including details of coverages, limits, deductibles and other pertinent information
- Submit, rate, quote and place quality new business in accordance with agency and company appetites
- Communicate effectively with customers, agency and company personnel
- Support Individual Benefits and other sales efforts through a mutual referral network to cross sell qualifying business
- Comprehensively access options available to client and make recommendations based on client need



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- Adhere to agency procedures and utilization of the agency management system to maintain client documentation and reduce agency exposure to Errors and Omissions
- Comply with all regulatory requirements regarding licensing, sales and service of Individual Health business
- Complete and maintain required reports and attend all sales and personal lines meetings as required
- Keep informed of industry developments through community involvement and continuing education
- Perform other specific duties and projects as assigned by agency management

### Knowledge, Skills and Abilities (KSAs):

- Solid personal character, including strong work ethic, great attitude, and willingness to assist others
- Proficient computer skills, as well as excellent multi-tasking, and organizational skills
- Exceptional customer service skills
- Make sure all quality, service, and productivity standards are met
- Maintain and direct the client policy process

### Education and Experience:

- High School Diploma or Equivalent required
- 1-3 years' sales experience in insurance or industry related field required
- Active 2-15 License is required

### Physical Demands:

- Must be able work with a computer for a minimum of 7 hours daily either standing or sitting
- Must be able to read printed materials and computer screen with or without MS or other software accessibility functions
- Must be able to effectively communicate in e-mail, by phone, or in person during the course of the workday

Employee Name: \_\_\_\_\_

Social Security Number: \_\_\_\_\_



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**Review:** This job description will be reviewed annually during your annual performance review. Your inputs will be considered and you are encouraged to submit any changes that would make this document more accurate. Updated job descriptions will be acknowledged by employee and supervisor.

### AT-WILL EMPLOYER STATEMENT & ACKNOWLEDGEMENT OF RECEIPT OF JOB DESCRIPTION

Peoples First Insurance Services, LLC is an “At-Will” employer. This means that either the employee or the Company is free to end the employment relationship at any time, for any reason, with or without cause and with or without notice. While positive performance evaluations, commendations, pay raises and longevity of employment are desired objectives, they do not change or alter the At-Will employment relationship.

I \_\_\_\_\_, do hereby acknowledge receipt of Peoples First job description for the position described above. I have read, understand and am able to perform the duties, responsibilities, and essential job functions of the position with or without reasonable accommodation.

**Employee Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Supervisor Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_