Case Manager

Position Summary

Experienced access person/case manager for a boutique wealth management firm, specializing in estate planning and business continuity. Successful candidates will have necessary licenses, profound understanding of advance case design, experience with new business processes, and the ability to service inforce contracts. Daily operations require close working relationships with producers, clients, and client's advisors.

Essential Functions

- Process new business
  - Submitting applications directly to insurance carrier
  - Generating illustrations on carrier websites, Winflex web, and VitalTerm
  - Creating cover letters
  - Collecting medical records utilizing Info Link, APPS
  - Working with insure carrier wholesalers, underwriters, internal sales and service support

- Advanced case design
  - Understanding complex insurance concepts
    - AFR (Private Finance)
    - Premium Financing
    - Trust owned life insurance (TOLI)
    - Corporate owned life insurance (COLI)
    - Business owned life insurance (BOLI)
    - Legacy Planning
    - Private Placement
    - Business Succession / Buy Sell Planning / Key Person

- Creating professional presentations for use with high net worth individuals and their advisors
- Obtain policy values, forms and information from insurance carriers via carrier websites, phone, and fax
- Develop good relationships with insurance carrier contacts who we rely on to provide prompt and accurate information
- Process general policy changes (change of owner or beneficiary, benefit reductions, change of address, etc.)

- Prepare periodic policy reviews for inforce policies
- Must be able to work both independently as well as part of a team
- Update and maintain client information and document all client transactions in the company database on a regular basis

Qualifications

- Bachelor's Degree
- Life & Health licensed, series 7 or series 6, series 63 & 65
- Five years minimum of experience working in the life insurance industry
- Specialization in business processing and servicing inforce policies
- Highly detailed oriented
- Proficient In Microsoft Work, Outlook, and Excel

About Tempewick Wealth Management

Tempewick Wealth Management LLC is a boutique Insurance, Investment, and Estate Planning advisory firm. With over 60 years of collective experience, we endeavor to help you understand your needs and concerns and tailor our advice to help you simplify your life and achieve your goals.

As independent advisors, we offer access to comprehensive products and services without limitation to proprietary products - without being driven by considerations other than our clients' best interests. We may receive either fees or commissions depending on either the services we provide or products selected. We believe that, unlike other advisors who to subscribe to a single method of compensation, maintaining this flexibility serves as one of our foundations and allows us to provide comprehensive advice to our clients and appropriate solutions as financial markets and products change over time.

Send resume and cover letter to:

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or call: 973.285.1000