

**HAMILTON INSURANCE AGENCY
JOB DESCRIPTION**

TITLE:	Benefits Analyst	FLSA STATUS:	Non-Exempt
GRADE:		APPROVED BY:	
DEPARTMENT:	HIA Direct	APPROVED DATE:	
SUPVR TITLE:	Manager- Direct Services		

Position Summary

The Benefits Analyst primarily handles the renewal process for a book of accounts, providing accurate and timely information and support.

Essential Responsibilities

#	Essential Responsibility	Frequency
1	Handle an assigned book of accounts. Respond promptly to telephone and email inquiries from clients about their accounts. Follow up on pending issues. May also act as liaison between client and carrier on escalated service issues and problems.	Daily
2	Handle the employee benefits marketing process for new business and renewals. For renewals: Run monthly renewal reports. Prepare renewal review sheets (120 days in advance of renewal date), summarizing policy details. For new business and renewals: Discuss any changes for upcoming cycle. Evaluate client's needs and prepare a recommended list of carriers to shop for coverage. Coordinate with Producer and/or management and CSR. Develop RFPs, recommendations.	Daily
3	Request premium quotes. Negotiate premiums with carriers. Prepare client proposals and spreadsheets.	Daily
4	Submit Broker of Record letters to carriers. Request all necessary documentation to establish account.	Daily
5	Maintain accurate records.	Daily
6	Develop and maintain comprehensive understanding of variety of document requirements such as enrollment forms, checks, applicable reports and spreadsheets, etc. as well as current knowledge of related industry laws and regulations.	Daily

The essential responsibilities require the following Physical/Mental/Sensory Abilities :	
1	Maintain a stationary sitting position most of the workday. Move about inside and outside buildings.
2	Operate computer, telephones and other office equipment, including grasping, fine manipulation, and repetitive motion.
3	Typically bend, stoop, crouch and reach on a regular basis.
4	Observe and identify surroundings. Judge distances and spatial relationships so as to see objects where and as they actually are.
5	Distinguish sounds. Comprehend and exchange detailed information, including conveying it to others accurately and/or quickly.

**HAMILTON INSURANCE AGENCY
JOB DESCRIPTION**

TITLE:	Benefits Analyst	FLSA STATUS:	Non-Exempt
GRADE:		APPROVED BY:	
DEPARTMENT:	HIA Direct	APPROVED DATE:	
SUPVR TITLE:	Manager- Direct Services		

6	Concentrate, recognize, remember, reason, analyze and make decisions.
---	---

The essential responsibilities include working under the following Working Conditions:	
1	Work primarily in well-lighted, well ventilated building with moderate levels of noise.
2	Subject to frequent interruptions and, on occasion, hostile or emotionally upset individuals.
3	Expected to report to work on time and work the full established schedule. May work, when necessary, beyond normal working hours, on weekends, and in other positions.
4	Generally involves minimal risk to physical and/or mental health and safety.

The essential responsibilities require the following Knowledge/Skills/Abilities:	
1	Knowledge of employee benefits programs and procedures.
2	Proficient oral and written communications skills (ability to read and write, follow written and verbal instructions, and communicate effectively in English).
3	Strong analytical, critical thinking and problem solving skills. Ability to read and interpret data, learn and apply new information and/or skills.
4	Good interpersonal skills. This includes being polished, courteous, professional, and patient.
5	Good organizational and time management skills (able to manage multiple tasks concurrently, adapt to changing priorities, and meet deadlines).
6	Detail oriented.
7	Good judgment.
8	Strong computer skills including Microsoft Office Suite (Word, Excel).

Level of Education
High School Diploma required.
Professional Licenses/Certifications
Life & Health License (or must be obtained within 6 months of hire).
Level of Experience
At least 3 years of related experience.
Work Contacts
Primary contacts are with co-workers, supervisor, carriers, and clients.

**HAMILTON INSURANCE AGENCY
JOB DESCRIPTION**

TITLE:	Benefits Analyst	FLSA STATUS:	Non-Exempt
GRADE:		APPROVED BY:	
DEPARTMENT:	HIA Direct	APPROVED DATE:	
SUPVR TITLE:	Manager- Direct Services		

Supervision
Expected to perform independently, with routine supervision, and exercise good judgment. Does not supervise other employees, but may assign work to other employees and check their work.

This job description outlines the general responsibilities and requirements for the stated position and in no way is an exhaustive list. The company maintains the right to assign or reassign responsibilities to this position at any time.

I acknowledge that I have read the job description and understand what is expected of me in this position. I am able to perform the assigned duties with or without reasonable accommodation.

Name (print): _____ Signature: _____

Date: _____