

# ACCOUNT MANAGER, EMPLOYEE BENEFITS

**Department**

Commercial Lines

**Reports To**

Client Services Manager

**FLSA Status**

Exempt

**About the Mahoney Group:** Founded in 1915, The Mahoney Group is one of the largest independent insurance, risk management and employee benefits brokerages in the U.S. A Top 100 brokerage firm, our expertise includes a range of industries including real estate, construction, nonprofits, homeowners' and community associations, and Native American tribes, schools and businesses. We attribute our success to delivering insurance coverage tailored to our clients' specific needs as well as a dedication to making a positive impact on the world around us. With operations in seven states and more than 240 employees, we're also an employee-owned company. To us, that simply means we have the independence to prioritize our clients' interests above those of Wall Street shareholders or investors.

## POSITION SUMMARY

The Account Manager position is responsible for managing the overall workflow for the books of business assigned to them. Account Managers handle all lines of Employee Benefits for their accounts and serve as the main contact for the clients.

## COMPETENCIES

- Day-to-day service questions for an assigned book of accounts
- Work collaboratively with Advisors regarding client needs to deliver exceptional service
- Actively and effectively manage annual enrollment periods and the implementation of plan changes and coverage transfer
- Provide employee communications to clients such as annual benefit enrollment guide, PowerPoint presentations, benefit summaries, enrollment forms etc.

- Secure and maintain current benefit plan summaries/documents, amendments, etc.
- Document issues related to clients in document management system
- Assist with day-to-day service issues and concerns such as complex service issues, claims, billing, eligibility, enrollment, and coverage issues.
- Answer questions regarding plan interpretation and compliance
- Follow up with clients on action plans to ensure decisions are implemented, contracts prepared, and appropriate parties are notified
- Prepare renewal binders, proposals and spreadsheets, ensuring accuracy and compliance
- Responsible for updating the agency management system and customer files in the document management system according to agency procedure

## **EDUCATION & EXPERIENCE**

- High school diploma or equivalent
- 1-3 Years in Employee Benefits
- State Life and Health License
- Ability to effectively communicate, both written and verbally, to internal and external parties
- Excellent time management, organizational and multi-tasking skills with high attention to detail
- Ability to build and maintain effective relationships with clients, carriers and peers
- Ability to work independently and in cross-functional teams
- Proficiency in Microsoft Office Products (Outlook, Word, Excel, Power Point)
- Previous Benefit Point or Applied Epic experience

## **PHYSICAL REQUIREMENTS**

The physical requirements are representative of those that must be met to successfully perform the essential functions of this job.

- Sit at a desk and use a computer for extended periods of time
- Lift and/or move up to 10 pounds and up to 25 pounds on occasion
- Regularly talk to communicate and hear to understand
- Use hands to reach and grasp and use fingers to feel and touch
- Ability to see with close vision and ability to adjust focus

## **WORK ENVIRONMENT**

The work environment characteristics described here are representative of those that may be encountered while performing the essential functions of this job.

Job duties are performed in an indoor office setting with computers, telephones, and copy/print machines. Noise levels are minimal to moderate.

## **WORK LOCATION**

- Hybrid Remote in Chandler, AZ

## **COMMITMENT TO DIVERSITY**

As an equal opportunity employer committed to meeting the needs of a multigenerational and multicultural workforce, The Mahoney Group recognizes that a diverse staff, reflective of our community, is an integral and welcome part of a successful and ethical business. We hire talent at all levels regardless of race, color, religion, age, national origin, gender, gender identity, sexual orientation, or disability, and actively foster inclusion in all forms both within our company and across interactions with clients, candidates, and partners.

## **BENEFITS**

- Employee stock ownership plan
- Immediate 401K Matching
- Generous time off policy
- Comprehensive company sponsored health insurance

- Dental and vision insurance
- Life insurance
- Flexible spending and Health Savings Account