



## Position Description

<b>Title:</b>	Employee Benefits Consultant
<b>Reports to:</b>	Employee Benefits Team Leader

### **Purpose of position:**

Act as lead on a book of accounts, providing expert employee benefits advice and day-to-day support to the assigned group of clients. Responsible for successful implementation of each client's annual strategic plan, including marketing and negotiating compliant health and welfare plans. Build strong relationships with clients.

### **Relationships:**

Clients, Carrier/Vendor Partners, Internal Employees

### **Essential Duties and Responsibilities:**

1. Regularly communicate with clients on a variety of benefits issues and projects relating to the annual strategic plan. Meet with clients at least annually to determine client goals.
2. Troubleshoot any client issues; respond to client requests within 24 hours of receipt. Resolve issues and communicate accordingly.
3. Negotiate and present client renewals on an annual basis.
4. Market client plans as necessary and present marketing analysis.
5. Responsible to keep up with all legislative issues related to employee benefits. Stay current on legislative issues and present them to the client as they impact client benefit plans.
6. Work with clients to determine content for client communication campaign materials.
7. Handle various administrative tasks associated with client service.
8. Assist with preparation of stewardship and financial reports for clients on an annual basis or as needed.
9. Follow up with Producers regarding account status/changes on a regular basis.
10. Develop strong relationships with carrier/vendor partners.
11. Conduct open enrollment meetings/presentations for clients as needed.

12. Participate in presentations for prospective clients; lead the discussion of Employee Benefits Consultant roles and responsibilities.

**Position Requirements (knowledge, skills and abilities required to perform satisfactorily in the position):**

- A bachelor's degree from an accredited university, risk management or human resources preferred
- At least three years of progressive experience with health and welfare plans required.
- A current life and health insurance license for the state of Georgia or the ability to obtain one within 60 days of hire.
- CEBS, ChFC, CLU or FMLA or progress toward designations preferred.
- Strong attention to detail and follow through required.
- Stellar presentation skills to audiences of all sizes required.
- Must possess excellent listening skills.
- Superior client service skills.
- Expert knowledge of Microsoft Office including Word and Excel.
- Strong organizational skills.
- Ability to multi-task and handle multiple projects with deadlines at the same time.
- Ability to work quickly and accurately.
- Ability to work as a team member, externally and internally.
- Ability to be flexible based on internal and external needs.
- Ability to work under pressure and multiple deadlines.

**Physical Demands:**

- Position requires sitting at a desk working on a computer for at least 2/3 of time.
- Position requires minimal lifting up to 25 lbs.
- Position requires regular and reliable attendance.
- Position requires proficiency in English and grammar usage skills.
- Position requires local and overnight travel (up to 30 to 40% of time).

By my signature below, I acknowledge that I understand the accountabilities of the role and that my performance will be evaluated based on my success in achieving the goals set out in the position. I also acknowledge that my job description may change due to changing company needs or environment and that my accountabilities may be changed or added to during the course of my employment.

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**Employee Name**

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**Date**