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# Example of Financial Services Insurance Job Description

Our growing company is hiring for a financial services insurance. We appreciate you taking the time to review the list of qualifications and to apply for the position. If you don’t fill all of the qualifications, you may still be considered depending on your level of experience.

## Responsibilities for financial services insurance

* Research and analyze financial statements and audit issues utilizing electronic databases, and employ audit software to review and compile financial information
* Owning the client relationships with a variety of clients within our Financial Services- Insurance practice
* Increasing assets of our Customer Solutions Centre by proactively contacting members leaving their employed sponsored plans and educating them on the benefits of enrolling in our Group Choices products
* Identifying opportunities, based on customer’s needs, and offering suitable Protection Solutions such as Health Benefit and Life Conversion policies
* Offering financial advice directly to transitioning plan members within the structure of our advice model and providing information relating to the various retirement and savings products available to them
* Attaining personal sales goals for asset and benefits enrolments
* Ability to positively impact and influence the decisions of plan members to ensure they are choosing the right products, funds and services that match their needs, risk tolerance
* Receive inbound calls and transferred sales leads from Group Benefits (GB) members who are leaving their employer, and want to convert their health and dental, life insurance and/or critical illness policies
* Provide phone consultation to members who have insurance needs by reviewing their options and recommending solutions that are aligned to their needs
* Contribute to the Rollover Protection sales target by meeting or exceeding individual count and premium targets

## Qualifications for financial services insurance

* Preferred - work experience in hospital medical billing
* Coordinate & implement end to end processes for insurance applications and associated policy requirements including
* Work on a wide range of audit clients across the insurance sector
* Have the opportunity to travel within the UK to work on clients and engagements that are of interest to them
* Participate in business development activities as we look to further expand our footprint in the insurance audit market
* Have the opportunity to work on advisory projects with subject matter experts in areas such as actuarial, prudential regulation, conduct risk