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# Example of Underwriting Specialist Job Description

Our growing company is looking to fill the role of underwriting specialist. To join our growing team, please review the list of responsibilities and qualifications.

## Responsibilities for underwriting specialist

* Assist UW Class with Role Playing Calls and objections
* Functions as a highly independent and experienced underwriter able to manage large complex cases, but is not yet expected to handle all levels of complexity
* Fosters continuous learning for themselves and others
* Use discretion to identify underwriting and behavioral opportunities that impact performance of the individuals being evaluated
* Review and evaluates Independent Agent performance as it pertains to retaining file documents
* Identify, track, and communicate quality review results to departmental managers and senior leadership
* Monitors trends in performance to identify training needs
* Work with management and/or Learning and Development Department to develop training plans
* Provide leadership, guidance, and training to peers, internal, and field customers
* Provide assistance to Policy Operations and/or Direct Sales teams in an effort to reinforce skills

## Qualifications for underwriting specialist

* Experience in the insurance industry or a related field (3-5 years)
* Bachelor’s degree (or working toward one) in a business related field business with an emphasis in management, accounting, finance, or a related field preferred
* Must have 9 hours in Accounting and/or Finance
* Previous underwriting experience is not required for Underwriting Specialist I, but some experience is preferred
* Four year college degree and three to five years of commercial underwriting or equivalent experience
* Candidates must have 9 hours in Accounting and/or Finance