



# Example of Underwriting Specialist Job Description

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Our growing company is looking for an underwriting specialist. Thank you in advance for taking a look at the list of responsibilities and qualifications. We look forward to reviewing your resume.

## Responsibilities for underwriting specialist

- Compile and outline for sales, broker or customer any additional information required to facilitate the application and underwriting process
- Learn multiple products to support revenue growth and cross-sell initiatives
- Developing, underwriting, and managing a portfolio of Contract Surety business
- Accurately and efficiently classify the mortality risk for proposed insured's as above average (Preferred/Select Preferred), average(Standard), below average (varying Substandard risks) based on both medical and nonmedical information on cases with 2-Year TAAR (Total Amount At Risk-Dollar amount requiring underwriting) of up to and including \$1,000,000 without an Attending Physician Statement
- Maintain a strong working knowledge of our administrative systems, product rules, and Underwriting Guidelines
- Author messages to Agents and General Office staff regarding application status, additional requirements needed, input errors and required corrections, Reinsurance offer details and requirements, the final underwriting decision and associated reason(s)
- Listen to Underwriter call clips
- Evaluate call quality using a detailed scorecard
- Maintain detailed call notes
- Relay scoring to direct leaders for coaching opportunities

## Qualifications for underwriting specialist

- Post secondary education or equivalent combination of education & experience KNOWLEDGE, EXPERIENCE AND SKILLS
- Minimum five or more years of group underwriting knowledge and/or related group insurance experience
- Proficient in MS Office ( Word, PowerPoint, Excel, and Outlook)
- Ability to develop strong relationships with sales and broker networks, carrier partners internal team members and customers
- Strong planning, math/analytical, and organizational skills
- Strong knowledge of Microsoft Windows applications