



# Example of Underwriting Specialist Job Description

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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

- 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