

## **Job Title: Account Manager**

### **Job Duties:**

- Manage client relationship for assigned block of business. Set and manage client expectations at all times while maintaining profitability.
- Conduct client "touch-point" calls or meetings, minimally quarterly. Annual on-site visit with Top 25 clients.
- Maintain performance guarantee documentation and monitor and provide client reporting to meet PG requirements at all times.
- Assist with or conduct implementation of all new clients.
- Maintain and update client records via processing system
- Respond to client inquiries timely and consistently within established time-frame (email one business day, voice mail 4 hours). Assist with questions related to:
  - status change rules
  - eligible/ineligible expenses
  - reporting and disclosure requirements (such as Summary Plan Description, Form 5500)
  - nondiscrimination testing
  - new regulatory guidance
  - plan design (such as how to mitigate risk, setting plan parameters, etc.)
  - servicing issues/concerns
- Track, investigate and resolve client concerns.
- Coordinate updates to plan documents & summary plan descriptions as needed.
- Coordinate renewal activity and deliverables.
- Remain informed and stay abreast of industry-related news and regulatory changes by reading pertinent business periodicals; be aware of competitive intelligence.
- Work as team, share helpful experiences and information for the betterment of the team, coordinate time-off and arrange for back-up support while out.
- Other duties as assigned.

### **Knowledge/Skills/Ability/Experience:**

- High school diploma or GED equivalency is required; College degree preferred or equivalent industry-related experience.
- Experience within group insurance/benefits industry.
- Proven ability to provide superior customer service and successfully build relationships with internal teams and client contacts.
- Solid working knowledge of flexible spending accounts and other account-based reimbursement plans with a general understanding of overall benefit programs.
- Ability to follow through and successfully execute tasks, understand large client needs versus small client needs and balance while adhering to specified qualified standards and standard operating procedures.
- Highly motivated, client-savvy, and solutions driven.
- Project a professional image and demeanor in action and appearance.
- Consistently be on time for work and all scheduled meetings and training classes.
- Expected to be a strong member of the community and further personal development in volunteer opportunities.
- Possess strong organizational and analytical skills and strong attention to detail.
- Possess excellent interpersonal, verbal and written communication and presentation skills.
- Ability to work well independently and as a cooperative team member.
- Possess aptitude for learning proprietary systems, applications and internal work flow of the department.

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