



Join our Team!

Join our team of multi-disciplined professionals who help clients preserve, leverage and transfer their wealth. Recently named one of Crain's Cool Places to Work for in Metro Detroit...our core values create an incredible working environment that allows us to really live and deliver on those values.

OUR CORE VALUES

Clients' Needs First! • Create a complete "WOW" experience for clients and our staff!

A Special Place To Be! • Cutting Edge Knowledge – we strive to be the experts.

[Click here to view the video](#)

UNDERWRITING CASE MANAGEMENT ANALYST

DESCRIPTION

We are seeking an organized, detail-oriented team player to contribute to the growth and profitability of our company. The Underwriting Case Management Analyst (UCMA) plays a vital role on the Underwriting Team, contributing directly to our premier client service strategy. The UCMA will focus their time providing support to the Underwriters and will follow their guidance in a fast-paced collaborative environment.

ESSENTIAL JOB FUNCTIONS

- Enter new case information in company database and system network
- Competitively shopping cases to multiple insurance carriers
- Enter offers from carriers into company database
- Prepares and reviews all incoming insurance applications making sure they are properly/thoroughly completed
- Proactively takes all necessary actions to move the underwriting process forward
- Assist in ensuring policies are tracked from being placed in-force to getting mailed out to client
- Serve as backup to our Underwriting Assistant
- Assist in the ordering of Attending Physician Statements (APs) and review of such to be sure all records are in before turning over to the Underwriter
- Complete term transaction memos
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EXPERIENCE

- 2 to 5 years administrative experience in an office environment
- Strong technical skills—CRM a plus
- Adept at Cloud-based applications and submissions
- Education: High School Diploma

REQUIRED SKILLS

- Motivation and passion towards process improvement
- Detailed-oriented team player
- Exceptional verbal and written communication skills
- Experience with MS Office—Word, Excel and Outlook
- Discretion/confidentiality a MUST in this position
- Energetic, enthusiastic, go-getter who will embrace the company's culture which is based on
- meeting our external and internal clients' needs and exceeding their expectations

Please send your resume to careers@schechterwealth.com