



**CONNER**  
INSURANCE

**POSITION TITLE: BENEFITS SPECIALIST**  
**STATUS: NON-EXEMPT**  
**REPORTS TO: SENIOR ACCOUNT MANAGER, BENEFITS**

#### **JOB SUMMARY AND PURPOSE**

The Benefit Specialist is an active member of the Benefits Team. The Benefits Specialist directly supports the team with accurate reporting, data management, preparation of employee communications and client materials, and day to day account support.

#### **ESSENTIAL DUTIES:**

- Develop and maintain effective working relationships with the team
- Communicate effectively across various levels of an organization
- Proficient in self-funded and fully insured marketplace and carriers
- Prepare and manage marketing spreadsheets, proposals, presentations, employee booklets, enrollment kits, enrollment forms, letters, and checklists
- Maintain and update necessary systems
- Ensure accuracy of data and materials
- Prepare and ensure accuracy on marketing projects, census data and quoting
- Evaluate market proposals for verification of benefits, premium and competitiveness
- Review contracts, amendments, policies, and notices for accuracy
- Maintain confidential information
- Participate in seminars and classes for skill and knowledge development

#### **ADDITIONAL DUTIES:**

- Perform other duties as assigned

#### **SKILLS and ABILITIES:**

- Exceptional in Microsoft Word and Excel
- Proficient in Microsoft PowerPoint, Publisher, Outlook and Adobe Acrobat
- Ability to perform duties in a high-pressured, fast-paced environment
- High degree of organizational skills
- Initiative and attention to detail
- Ability to prioritize and remain flexible
- Professional telephone skills and etiquette
- Self-motivated and able to work both independently with limited supervision and within a team
- Ability to think independently and critically
- Ability to define problems, collect data, establish facts, and draw valid conclusions
- Ability to apply basic mathematical concepts such as percentages, addition, subtraction, multiplication and division
- Excellent oral and written communication skills
- Ability to read, analyze, and interpret industry policies and contract documents
- Ability to respond to common inquiries or complaints from customers or carriers
- Ability to prepare proposals for presentation and review

#### **EDUCATION AND/OR EXPERIENCE:**

- Bachelor's degree preferred. High school diploma or equivalent is required

#### **CERTIFICATES, LICENSES, REGISTRATIONS:**

- None

The above statements are intended to be a representative summary of the responsibilities performed by incumbents of this job. The incumbent's may be requested to perform job-related tasks other than those stated in this description.