SAPERS & WALLACK

Creative thinking, Customized solutions. Caring about you since 1932.

Client & Office Support Specialist

Background:

Sapers & Wallack, a leading independent, full-service financial and insurance advisory firm, is looking for a Client & Office Support Specialist. For over 80 years, our sales associates have worked to build long term relationships with our customers, helping them navigate our full range of investment, insurance, executive benefits and employee benefit products and services. The primary role of the Client & Office Support Specialist is to help grow our business through supporting sales, servicing our clients, and providing administrative support to achieve the firm's initiatives.

Responsibilities:

Client Service Support

- Conduct policy reviews
- Complete insurance summaries and comparisons
- Prepare and track premium invoicing and administration fees
- Process policy changes
- Order inforce illustrations
- Correspond with carriers, clients and team to meet client expectations

Administrative Support

- Salesforce database entry, maintenance and improvements
- Ordering of office supplies, maintaining office support calendars and Outlook calendaring
- Assisting with pre- and post-sale administrative duties as needed
- Creating client and/or prospect correspondence letters
- Other office projects as needed
- Providing administrative support to Director of Underwriting pursuant to new business in pipeline

Requirements:
Bachelor degree
3+ years in insurance industry preferred
Proficient in Microsoft Office products (Excel is a plus)
Basic industry knowledge of Life, Disability, LTC and Annuities preferred

Other Qualifications:
Motivated; highly organized; excellent written and verbal communication skills and ability to speak with clients. Strong computer skills. Client management system knowledge (Salesforce experience is a plus).

To Apply Please Email: emacedo@sapers-wallack.com