



Job Posting: Insurance Associate

POSITION: Insurance Associate

OVERALL FUNCTION

- Next Phase Advisory Group is seeking a highly organized and detail-oriented Insurance Associate to join the firm. The successful candidate will be responsible for managing new insurance business and providing exceptional support to financial advisors and clients.

DUTIES & RESPONSIBILITIES

- Oversee the complete process of new insurance applications, from initial submission to policy issuance.
- Ensure all applications and documents are accurately completed and comply with industry regulations and company policies.
- Coordinate with insurance carriers to resolve any issues or discrepancies in the application process.
- Coordinate with medical examiners to ensure coordination of appointments and receipt of results.
- Serve as the primary point of contact for financial advisors and clients regarding new insurance applications.
- Address inquiries and provide timely updates on the status of applications.
- Assist in gathering necessary documentation and information from clients.
- Stay current with industry trends, regulatory changes, and new insurance products.
- Maintain organized records of all applications and communications.
- Identify opportunities for process improvements to enhance efficiency and client satisfaction.
- Collaborate with other departments and team members. Assist with insurance service as needed.

SKILLS/QUALIFICATIONS

Required

- Bachelor's degree in business administration, Finance, Insurance, or a related field.
- Current Life & Health Insurance License or willingness to obtain upon hire
- Proficiency in Microsoft Office Suite (Excel, Word, PowerPoint) and familiarity with insurance processing software.
- Excellent written and verbal communication skills, with the ability to interact professionally with clients and advisors.
- Strong critical thinking, organization, and time management skills
- High level of professionalism and commitment to ethical standards.
- Comfort and confidence in learning new processes and workflows.
- A client-focused mindset with the ability to build and maintain strong client relationships.
- Timely follow up and sense of priority.
- Strong problem-solving ability. Ability to adapt to change and thrive in a fast-paced environment.
- High level of emotional intelligence.
- Strong attention to detail, accuracy, and reliability
- Serve as a high functioning member of a team, able to work well in a team environment as well as independently.
- Ability to take initiative and ask probing questions.
- Ability to maintain confidentiality and privacy.

Preferred

- Previous experience in insurance processing, operations, or a related field within the financial services industry.
- Previous experience working in insurance, finance, wealth management, or related field.

COMPENSATION AND BENEFITS

- Salary Range: \$55,000-\$85,000 based on previous roles and experience
- Other benefits
 - Medical, dental, and vision coverage
 - 401K
 - Life Insurance
 - Short/long term disability
 - Paid Time Off
 - Flexible scheduling/work from home
 - Continuing education
 - Work perks such as lunches, team outings, etc.

WORKING CONDITIONS

- Work will take place in a traditional office setting.
- Most time will be spent working at a desk.
- There is no fully remote option for this position - must be in office a minimum of 3 days/week.

COMPANY OVERVIEW

Next Phase Advisory Group is a Private Client Group firm within Northwestern Mutual, with access to resources befitting high-wealth clients. Next Phase Advisory Group works as a trusted guide, clarifying financial goals and helping to navigate life's transitions. The firm supplies big-picture thinking that goes well beyond the investment portfolio.

NPAG's comprehensive approach aligns life plans with financial plans, putting together a strategic balance of retirement planning, insurance solutions, intergenerational planning, wealth management, and more. The team helps clients to define financial goals and plot a decisive course of action with a unique focus on the importance of maintaining strong client relationships.

When working with our team, your life journey only gets better.

APPLICATION PROCESS

- Position will remain open until filled.
- Screening process will include on-site interviews and assessments.
- Background check/finger printing process required before hire.

Please send resume and cover letter to Michael Lushniak, Director of Strategic Development via email at Michael.lushniak@nm.com

Next Phase Advisory Group is an equal opportunity employer and values diversity. The firm does not discriminate on the basis of race, religion, color, national origin, gender, sexual orientation, age, marital status, veteran status, or disability status.