

Mesirow Financial

Contact Person: Ashley Tsolis, *HR Coordinator*
Email Address: atsolis@mesirowfinancial.com
Address: 353 N Clark St
Chicago, IL 60654
Phone: 312.595.6514
Company Website: <http://www.mesirowfinancial.com>

Position Title: Senior Account Representative

Opportunity Location: Chicago, IL

Job Description:

Mesirow Financial is seeking a Senior Account Representative to manage larger, more complex, (including self-funded) cases and be a resource to the Team Leader.

Responsibilities:

- Act as liaison between client and insurance companies in order to independently resolve all normal service problems. Specifically, to assist the client in resolving billing, claim, member services and customer service problems.
- Independently manage (with input from the Team Leader(s)) transitional insurance company materials. Specifically, these materials include but are not limited to:
 - o Master application and binder check
 - o Termination letters to the terminated insurance companies (once the master application and binder check are received by the newly appointed insurance company)
 - o Review and proof all employee enrollment materials before they are sent to the client for delivery.
 - o Delivery of enrollment kits
 - o Review medical plan contracts and employee booklets (confirming benefits once the booklets or booklet proofs are delivered) for completeness and accuracy.
- Independently manage (with input from Team Leader) the enrollment process by coordinating the various implementation items. Specifically, this process includes, but is not limited to:
 - o Confirming benefits to be communicated during the enrollment meetings with the client and the insurance companies
 - o Preparing or obtaining employee enrollment materials
 - o Coordinating employee meeting schedule (does not necessarily mean attending each meeting) and possibly conduct the employee enrollment meetings
 - o Review medical plan contracts and employee booklets (confirming benefits once the booklets or booklet proofs are delivered) for completeness and accuracy.
- Develop and/or prepare communications materials for clients. This function will vary by client. These may include, but are not limited to:
 - o Enrollment and service communications
 - o Employee announcements related to the benefits programs
 - o Design, implement and analyze and present results of employee surveys
 - o Wellness communications and health fairs
 - o Design and distribute e-shares
- Maintain regular contact with clients to provide service and enhance Mesirow/client relationship. These service/relationship calls include but are not limited to:
 - o Routine phone calls
 - o E-mails
 - o On-site service visits

- o Business lunches approved by Team Leader
 - o Coordinate other client events as dictated by Team Leader
 - Assist clients in developing wellness program, depending on Team Leader direction and/or needs of client.
- Responsibilities may include but are not limited to:
- o providing carrier or vendor wellness materials and information
 - o Work with Client Services wellness staff to assist in wellness assessment and assistance for client
 - o Evaluate aggregate results of health risk assessments to help clients make decisions about wellness programs.
 - Be able to communicate Value Added Services to clients as appropriate.
 - o Prepare all reports/checklists appropriate to client. These include but are not limited to:
 - o Service calendar to be posted in a mutually agreed up on place
 - o Service call reports to be reviewed quarterly at team meetings
 - o Implementation checklist
 - o Booklet plan design checklist
 - Ensure that up to date booklets are on file for all clients for all lines of coverage.
 - Ensure that all HIPAA Business Associate Agreements are up to date and on file for all clients for all lines of coverage.
 - Maintain all internal reporting systems on clients and policies as determined by Team Leader (includes Sagitta and BOB Production Reports).

Other:

- Keep up to date with technology as it applies to job (tools, applications, internet resources, etc.).
- Keep current on legislation directly affecting clients and the insurance industry and effectively communicate legislative issues to clients.
- Work on special projects as assigned by management.
- Pursue a program of personal, professional and career development towards Account Executive position.
- Maintain insurance license by completing company-provided online courses and/or management-directed continuing education.
- Adhere to all published Mesirow Financial rules, regulations and procedures.

Requirements:

- Bachelor's degree from four-year college or university;
- Minimum of five years insurance agency or company experience specializing in employee benefits and self-funded medical plans; or equivalent combination of education and experience.
- Minimum of two years' experience as a Mesirow Financial Account Representative/Specialist or equivalent industry experience in servicing of accounts.
- Experience with Microsoft Office applications.
- Internet experience necessary.
- Strong carrier knowledge (plan designs, etc.) necessary.
- Solid understanding of benefit products including, but not limited to Medical, Dental, Life, Disability, Section 125, voluntary products, etc. as well as COBRA, HIPAA, health reimbursement arrangements, health savings accounts, etc.
- Superior communication and presentation skills.
- Superior interpersonal skills.
- Access to automobile transportation necessary.
- Ability to resolve problems independently.
- Ability to handle own workload plus delegate to and assist other team members with their work.
- Strong sense of initiative.
- Strong organizational skills.
- Ability to multi-task and re-prioritize frequently.
- Professional appearance.
- Illinois Insurance license.

*If you are interested in applying for this position, please email Ashley at atsolis@mesirowfinancial.com for consideration.