



## Licensing & Contracting Specialist

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### **SUMMARY:**

Contributes to the successful administration of the AA contracting and licensing functions.

**ESSENTIAL DUTIES AND RESPONSIBILITIES** include the following. Other duties may be assigned.

- Licenses, appoints, contracts and codes to computer all agents for the company.
- Changes and maintains agent records.
- Verifies that all required contracting paperwork is received for new or reinstated agent applicants. Follows-up with applicants or managers if paperwork is incorrect or incomplete.
- Builds and maintains agent records on LIFE-COMM regarding: contract, license, hierarchy, appointment, AML, and address.
- Processes commission schedules and address, e-mail, and hierarchy changes.
- Orders checks, deposits checks, and makes accounting entries on LIFE-COMM system to pay all fees associated with appointing or licensing agents.
- Appoints agents with the individual states.
- Prepares license applications and submits to the state or assists agents in acquiring licenses.
- Researches information about laws, licensing, appointments and contracting on various state insurance department websites and call the departments to obtain necessary information if it is not available on the web site.
- Maintains electronic agent contract files.
- Terminates agent contracts and state appointments.
- Counsels agents on state laws and completion of licensing forms.
- Identifies and properly codes agents to resolve policy application errors.
- Answers questions related to contracts and commissions and assist agents in navigating the company's websites.
- Conducts Company business in accordance with all applicable laws, regulations and contractual obligations. Behaves ethically and with integrity and always follows the principles of the Compliance Program when making business decisions. Compliance with this program is a condition of employment for every American-Amicable employee.

### **EDUCATION, WORK EXPERIENCE and TRAINING REQUIREMENTS:**

- High school diploma or general education degree (GED).

- At least two years of strong administrative work experience, preferably in a contracting & licensing role within the life insurance industry.

**REQUIREMENTS: To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.**

- A friendly, positive, learning-oriented attitude.
- Perform detailed work requiring visual acuity
- Analytical skills
- Written/Oral communication skills
- Documentation and organizational skills

**WORKING CONDITIONS, PHYSICAL and MENTAL REQUIREMENTS: The working conditions, physical and mental requirements described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.**

Work is sedentary in nature and is performed in a traditional office environment with cubicles. Typically, the incumbent will sit comfortably while performing the work, with some walking, standing, bending and carrying of light items, such as papers, books, and files. Other physical demands in performing the essential functions of this position include: digital dexterity, hearing, seeing, and talking. Mental requirements include, but are not limited to, the ability to concentrate, take initiative, cope with stress, adapt, and stay alert in a business environment.

**Note:** This job description reflects a summary of the job and does not prescribe or restrict the responsibilities that may be assigned. This job description is subject to change at any time.