Sagicor Life Insurance Company
Job Description

Department: New Business
Position: Policy Issue Assistant – Policy Assembly (Non exempt)
Grade: 1
Supervisor: Manager, New Business

Purpose

Provide administrative support and perform administrative tasks within the defined Service Level Agreements (SLA's) and comply with regulatory requirements. Effectively communicate with producers and other team members. Promote and follow company and department policies and procedures. Provide a positive example of professionalism and exceptional work ethics.

Duties and Responsibilities

- Print and assemble life policies and annuity contracts, prepare shipping request for mailing and update all systems with date mailed and delivery requirements.
- Draft cover letter for and mail Notice of Replacement or other required documentation within the defined time frame and update all systems with mailed date (Scottsdale location).
- Draft cover letter for and mail transfer paperwork, prepare shipping request for mailing and update all systems with mailed date (Scottsdale location).
- Compile and mail withdrawal, decline and NTO letters with any refund check, prepare shipping request for mailing and update all systems with mailed dated.
- Order and manage supplies required for policy assembly.
- Escalate exceptions and/or matters of concern to Lead or Supervisor.
- Successfully complete required LOMA courses (280 and 290) within first 2 years of employment.
- Required to complete 8 hours of community service. Participation can only be done through the organizations that have been designated by Human Resources to each Sagicor business/office location. These hours are to be scheduled through your Department Manager.

Decision Making Authority

- Authority to make decisions as defined by policies and procedures and system processes for new business.
- Authority to make decisions as directed by Lead or Supervisor.

Education and Experience

- High school degree and some college experience or minimum of one year experience in life and annuity new business.
- Successfully complete all required company training (i.e. HIPPA, AML, etc.).
- Good written and oral communication and interpersonal skills.