



POSITION TITLE: Retirement Income Case Manager **DEPARTMENT:** Annuities
OFFICE LOCATION: Fort Wayne or Remote **FLSA STATUS:** Exempt
REPORTS TO: Team Lead, Retirement Income Case Management
HOURS: Full-Time

For more than 50 years, Ash Brokerage has been dedicated to impacting lives. We were founded on the power of relationships, and that still drives our culture today. Our team of 400 is the same service-centered culture as we were in 1971.

Ash Brokerage works with financial professionals to help find, understand and process insurance and retirement solutions to protect clients in every stage of life. As part of the Integrity Marketing family, we help people protect their health and wealth for the good days ahead and make the most of what life brings.

On the Retirement team, we're strong advocates for our agents and their clients and work in a time-sensitive, market-driven environment to meet needs.

Responsibilities

As case manager, you serve as a liaison between our financial professionals and our carrier partners to ensure a smooth and successful process. You will:

- Monitor case progress, track down requirements and provide ongoing status updates
- Review application information to identify any issues that could present a problem – if necessary, you'll research and present alternative solutions
- Educate yourself on the latest product offerings and industry developments and educate advisors on those subjects to help create new business opportunities
- Continuously look for ways to expedite and improve our processes and services
- Maintain positive relationships with your agents and underwriters
- Deliver great customer service

Talents and Abilities

- Positive attitude, team spirit and consistent drive to provide industry-leading service
- Superior negotiation skills to influence successful outcomes
- Detail-oriented
- Track record of success in a fast-paced customer service environment
- Strong phone and computer skills – specifically Microsoft Excel and Word – with the ability to quickly learn our internal and carrier software
- Able to prioritize and switch tasks through the day and remain organized

Education and Experience:

- Minimum three years of business experience with a focus in finance and insurance, or ...
- Associate degree with one to two years of experience, or ...
- The equivalent combination of education and experience

Ash Brokerage is an equal opportunity employer. We celebrate diversity and are committed to creating an inclusive environment for all employees.