

Job Title: Associate Financial Representative

Location: Leawood, KS

Job Description:

The Associate Financial Representative will assist with both investment operations and insurance underwriting operations for our Leawood, KS financial planning team. Responsibilities include overseeing the insurance underwriting process from application submission through policy delivery, while providing updates to clients and team members throughout. Additionally, the Associate Financial Representative will aid in client review preparation, completing client service requests, managing the Client Relationship Management system, scheduling appointments, and assisting with investment account generation and service.

Job Duties:

- Facilitate Underwriting Process for Life Insurance, Disability Income Insurance, and Long-Term Care Insurance
- Schedule Appointments and Calendar Management
- Client Account Review Preparation and Follow Ups
- Upkeep / Maintenance of the Client Relationship Management System
- Assist Clients with Service Requests and Policy / Account Inquiries
- Ongoing Investment Account Maintenance

Qualifications:

- Bachelor's Degree in relevant field of study: Finance, Accounting, Economics
- Successful completion of Life and Health Insurance License Exam prior to start of employment; successful completion of internal exams upon employment

Required Skills:

- Attention to Detail
- Critical Thinking
- Team Player
- Excellent Written and Oral Communication Skills

Please submit cover letter and résumé to katherine.barnard@nm.com