

Customer Service Advocate Job Description 2024

Job Title: Customer Service Advocate
Reports To: Vice President of Compliance and Administration
Department: Compliance
Position Type: Temporary, time-frame will be evaluated on a quarterly basis
Location: Remote – must be able to work 8:00 am – 2pm PST
Hourly Rate: Hourly rate range \$26 - \$31. Pricing for this role may vary within this range based on many factors including geographic location, experience, and skills.

Position Summary:

Perform application scrubbing and suitability pre-approval, as well as provide education to field on “in good order” requirements, policies & procedures, forms, general requirements, carrier rules, and compliance requirements. Provide technical support for e-app software. Serve as contact for escalated service inquiries and complaints received from agents or internal Legacy employees. Work closely with carriers and/or third-party administrators on pending case management of new business applications to ensure timely processing and receipt of requirements, and providing high touch service to agents qualified for Legacy’s Concierge and Honors programs.

Essential Duties of the position:

	<i>Percent of time</i>
1 Provide support to producers and IMO’s by reviewing applications packages prior to submission to ensure they are “in good order” (IGO) and suitability pre-approval. Provide technical support to producers and IMO’s for e-app software.	40%
2 Act as a key point of contact for agents, internal Legacy employees and carriers and/or third-party administrators (TPAs) to assist in resolving or escalating all types of service issues.	30%
3 Monitor pending new business to ensure processing is within Legacy’s service level agreement with carriers. Provide case management of pending business for Concierge program members.	20%
4 * Legacy essential duties	10%
	<i>Total = 100%</i>

Minimum Requirements to Perform Essential Duties of the Position:

- 1 Excellent customer service and problem solving skills
- 2 Precise attention to detail and the ability to multi task, research and analyze complex data.
- 3 5 years annuity and/or life insurance experience in operations/administration
- 4 MS Windows, Microsoft Office Skills
- 5 Excellent written and oral communication

Ideal/Preferred Requirements to Perform Essential Duties of the Position:

- 1 LOMA annuity education courses
- 2 Fixed indexed annuity experience
- 3 Suitability/best interest experience

***Legacy Essential Duties:**

In the spirit and support of Legacy's Corporate Culture, it is the expectation that all employees will act in ways that support our Values by participating in the following:

Communication - Ensure that information is delivered effectively for positive and strong relationships.

Continuous Improvement - Strive to set and reach a higher standard in everything you do.

Flexibility - Go outside of your regular job duties to support the team, department, and organization needs.

Performance Alignment and Accountability - Create and meet objectives that are in sync with team, department, and organization goals and objectives.

Problem Solving and Conflict Resolution – Address problems and resolve conflict in a timely manner in an effort to find positive solutions and create action plans that support the bigger picture.

Recognition-Motivate co-workers by providing positive reinforcement of good to great results.

Shares Knowledge and Supports Others - Ensure the success of all team members and the organization.

Team Member Selection and Training - Participate in the acquisition and training of best possible talent. Provide on the job training, as needed.