

CLIENT SERVICES SPECIALIST

SIMA Financial Group, Inc. is a professional services firm headquartered in Richmond, Virginia that employs a talented, client-centered team of professionals and support staff. Our certified and licensed professionals are dedicated to their unique discipline within SIMA's six core competencies: accounting, employee benefits, payroll, technology, corporate retirement, and wealth management. We work closely with businesses and individuals to provide a superior experience to our diverse clientele that includes business owners, executives, entrepreneurs, and investors.

OVERVIEW & RESPONSIBILITIES

Our employee benefits division is seeking a highly motivated, client centric Client Services Specialist to join our team. The Client Services Specialist will provide proactive support to both Account Managers and Senior Account Manager in an internal capacity such as renewal quoting and spreadsheets, processing enrollment/termination changes and internal department projects.

- Assists with the preparation, review, and distribution of all employee communications, including Benefit at a Glance and Benefit Booklets.
- Helps coordinate materials and documents for clients, including open enrollment packets.
- Reviews enrollment forms received for missing information and processes directly with the carriers.
- Sets up and maintains client folders and saves documentation and workpapers. Ensures documentation is on file for group contracts, final applications, and final plan information.
- Maintain client information and ensures accurate data in Agency Bloc.
- Maintains internal commission process.
- Seeks solutions and dedicates oneself to continuous improvement personally and on behalf of the team by promoting, recommending, encouraging, and implementing positive change.
- Participates in training opportunities, reads, and shares industry knowledge, maintains professional designations, and seeks professional growth, development, and advancement.

QUALIFICATIONS & REQUIREMENTS

Education & Experience

- Proficient in all Microsoft Office products, required.
- High School Diploma or equivalent required. Associate's or Bachelor's degree preferred.
- Experience in employee benefits industry is a plus.
- Experience with AgencyBloc, a plus.

Skills & Core Values

- Demonstrated ability to drive execution and results
- Strong analytical and problem-solving skills
- Demonstrated ability to communicate with clients
- Excellent communication skills, both written and verbal
- High level of confidentiality and professionalism
- Client service oriented

- Strong organizational and time management skills
- Detail-oriented with a high degree of accuracy
- Ability to manage workflow and ensure projects/tasks are processed in a timely manner
- Ability to be proactive and not reactive in all aspects of daily job functions
- Ability to collaborate and operate as part of a team
- Self-motivated and able to work well within a fast-paced environment with firm deadlines

SALARY & BENEFITS

We offer an attractive salary with future opportunities for growth and advancement. In addition, we offer an exceptional benefit package, including an employer 401(k) matching contribution, Paid Time Off, long-term disability insurance, life insurance, and elective medical, dental and vision benefits.

CONTACT

To be considered for this immediate opening, please send your resume with salary requirements to careers@simafg.com. This position will remain open until filled.

EOE. SIMA Financial Group, Inc. reserves the right to alter, change, modify and/or terminate this job posting at any time without notice, or obligation, to any party.