

Licensing and Contracting Specialist Job Description

Job Title: Licensing and Contracting Specialist
Reports To: Chris Eaken, Vice President of Compliance and Administration
Department: Compliance
Position Type:: Part-time, hourly, remote or on-site
Work Hours: 8:30 am – 3:30 pm PST (6 hours per day)
Hourly Rate Range: \$25 - \$26 per hour

Position Summary:

Performs a wide variety of complex service tasks and requests to contract and appoint producers (insurance agents) and IMO's (Insurance Marketing Organizations) with Legacy and unaffiliated insurance carriers throughout the U.S.

Work closely with Legacy employees, as well as carriers, producers and IMO partners to efficiently process contracting paperwork and requests related to state appointments while complying with carrier and state and Federal laws, including but not limited to FCRA and state licensing laws.

Effectively problem solve to remove any barriers during the contracting or appointment process, and provide excellent customer service internally and externally, verbally and in writing.

Accurate and efficient processing of ongoing producer/IMO records maintenance requests, including address, IMO, level changes and other miscellaneous changes to existing records. Perform general administrative functions including emailing, scanning, faxing, filing, copying, and maintaining accurate business records.

Miscellaneous licensing and contracting projects as needed.

Essential Duties of the position (percentage of time)

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|---|--|---------------------|
| 1 | Process new producer/IMO contract requests, as well as maintain existing contracts, including requests for requirements, terminations, contact information updates and appointment requests in compliance with carrier guidelines, state and federal laws including, but not limited to FCRA and state license laws. Respond verbally or in writing to external customer service requests. | 65% |
| 2 | Perform general administrative functions including emailing, scanning, faxing, filing, copying, and maintaining business records in imaging system. | 10% |
| 3 | Provide internal customer service, research questions relating to contracting/appointments, status reports, and producer maintenance requests. | 10% |
| 4 | Miscellaneous licensing projects as requested. | 5% |
| 5 | * Legacy essential duties | 10% |
| | | <i>Total = 100%</i> |

Minimum Requirements to Perform Essential Duties of the Position:

- 1 Detail-oriented with the ability to prioritize and handle multiple tasks and requests simultaneously.
- 2 Strong organizational and time management skills.
- 3 Must be customer service oriented and have excellent written and verbal communication skills, including ability interact with internal and external customers, including extensive phone and email contact.
- 4 General office and computer skills. Intermediate proficiency in Microsoft Office and Excel. Experience navigating websites and online applications.
- 5 Ability to adapt quickly to new processes and procedures.
- 6 Prior office, licensing or customer service experience in a fast paced office environment.

Preferred Requirements to Perform Essential Duties of the Position:

- 1 Prior insurance company, IMO or broker dealer licensing and contracting experience
- 2 LOMA AIAA designation
- 3 Associate of Arts degree in Business Administration

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 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.