



JOB DESCRIPTION: HEALTH & BENEFITS SENIOR ANALYST

Summary:

This position is responsible for supporting consultants in managing client accounts by requesting and analyzing data from various carriers/vendors, researching compliance issues, and evaluating benefit plans and programs. The senior analyst will also participate in presentations and respond to client needs, as appropriate.

Responsibilities:

- Demonstrate strong knowledge of clients assigned to and act as client lead, when appropriate
- Work closely with H&B consultants to assist with client projects
- Mentor and assist with training H&B analysts
- Utilize internal resources effectively on client projects based on expertise
- Deliver superior, consistent client management and deliverables for assigned clients
- Manage relationships and coordinate tasks with vendors
- Manage carrier/vendor data collection, input and analyze data for trends and prepare client reports for final peer review by the consultant
- Effectively assist with the resolution of client vendor issues
- Independently prepare and distribute Request for Proposals (RFPs) for medical, prescription drug, dental vision, life, disability, and voluntary benefits, including data collection, preparation of bid specifications, summary of proposals, manage/coordinate follow up with carriers/clients, and preparation and presentation of the results, seeking consultant guidance as needed
- Assist with developing plan design recommendations for clients
- Independently lead/manage client vendor implementations, seeking consultant guidance as needed
- Review of Summary Plan Descriptions (SPDs), benefit summaries, booklets, and contracts
- Lead preparation of client employee communication materials
- Conduct compliance research independently, seeking Consultant guidance as needed
- Assist with preparation of client Welfare Form 5500 filings and Summary Annual Reports
- Actively participate in meetings and communicate with clients, as appropriate
- Work within the established fee/commission budget
- Participate in training programs to enhance benefit industry knowledge



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Technical Skills

- Strong project management skills
- Detail oriented with proficient analytical skills
- Ability to work on and complete multiple tasks under aggressive timeframes
- Strong oral and written communication skills
- Proactive with carriers and clients
- Ability to work with multiple reporting systems to extract data
- Excellent interpersonal and communication skills (verbal and written)
- Ability to work both independently and within a team to meet common goals
- Proficient in Microsoft Word, Excel, Outlook, and PowerPoint

Education

- Bachelor's Degree
- Health, Accident and Life PA License Preferred

Experience

- A minimum of 3-5 years of directly related health and welfare benefits experience with a consulting firm or insurance company
- Underwriting experience preferred

Reports to: Vice President, Health & Benefits and Operations