



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 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 analyst.
- 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 in 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.

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 three (3) to five (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 and Benefits and Operations