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1717 Arts Plaza #1907 
Dallas, TX 75201

Job Title

Proposal Analyst

Company

Confidential

Location

Plano, TX

Job Type

Full-time

Salary

\$40,000 - \$45,000, depending on experience

Industry

Insurance / Banking

About the Company

Our client is a small, privately owned company with over 25 years of experience in the business of providing community banks throughout the country with simple and complex benefit and incentive programs to help them attract and retain qualified executives. Client has worked with over 600 financial institutions throughout the country and market our services nationwide. The company's core values are to provide excellence in an ethical manner with a good attitude. Teamwork is emphasized, and the company takes an interest in the personal growth of its employees.

Job Description

The Design and Analysis Specialist focuses on creating complex, customized proposals in support of new and current clients. The D&A Specialist combines tailored nonqualified benefit plans with a variety of insurance products to provide solutions to client's employee retention and reward programs. The Design and Analysis Specialist also guides clients' through the implementation process and provides required documentation of solutions.

This role is highly interactive and requires close teamwork with internal partners (sales consultants, new business, and client services), outside partners (attorneys, insurance carriers, and accountants), and clients and prospects. The role is instrumental in developing and enhancing client and consultant relationships by generating quality presentations that positively impact client needs while ensuring a positive client experience.

Responsibilities

- Analyzing insurance carrier product features and performance
- Running multiple insurance illustration systems

- Working directly with various carriers to obtain case illustrations and approval
- Comparing financial impact to client of various employee benefit plans using a variety of proprietary proposal tools
- Conducting insurance needs analysis for benefit expense offset and business succession planning
- Reviewing and ensuring accurate benefit plan documents for client intent
- Preparing employee benefit plan enrollment packets
- Creating required due diligence and compliance documentation for client records
- Being a resource for internal partners on various insurance products and plan designs

Experience and Qualifications

- Bachelor's Degree in Accounting, Economics, Finance, Math or relevant, equivalent experience
- 1-3 years of professional experience
- Life insurance knowledge/experience a plus
- Must be able to demonstrate "proficient plus plus" skill level in Excel, Word, and Power Point
- Knowledge of other financial instruments, net present values, and internal rates of return calculations
- Tracks, updates, and reports all cases and projects utilizing company reporting and sales tools
- Meticulous attention to detail across all aspects of data, language and grammar, and general layout and presentation format
- Excellent verbal and written communication skills, plus strong proofreading skills
- Flexible and adaptable, ability to adjust to changes in workflow and succeed in a fast-paced, deadline-driven environment
- Excellent research and analysis skills, and follows/problems issues to a successful conclusion
- Resourceful, self-starter who is able to work independently and as part of a team
- Proactively takes ownership and initiative to complete tasks, follows through and follows up, understands when and how to involve others
- Keeps obligations to perform work and accepts responsibility for outcomes and results