

## Case Design Analyst

First American Insurance Underwriters (FAIU) is a Needham, MA-based brokerage general agency specializing in Life, Long-Term Care, Disability, and Annuity products. FAIU assists advisors in finding cost effective, creative solutions to meet the needs of their clients. Our experienced team delivers exceptional underwriting, case design, and service. We represent more than 40 insurance carriers nationwide enabling us to find the right carrier for the advisor's client's needs and place their most challenging cases. We are built on a foundation of experience and knowledge, allowing us to keep our promises and provide the value advisors and their clients deserve. FAIU has an exciting opportunity to join our growing team as a Case Design Analyst.

### Essential Functions

- Responsible for supporting internal partners and external financial advisors by providing case design and advice, product illustrations and analysis of Life Insurance, Long Term Care (LTC) and Disability Income (DI) Insurance.
- Maintain broad knowledge of life insurance, LTC & DI product landscape as it pertains to available products, carrier illustration software, marketing resources, and sales ideas
- Assist advisors in selecting carriers and products that will best meet their client's needs
- Produce accurate product illustrations and competitively position and recommend these product recommendations to advisors in a timely manner
- Work closely with sales team to support and develop winning sales ideas, strategies and proposals for customers
- Quickly respond to inquiries relating to complex and technical questions while demonstrating an understanding of multiple product portfolios and cross-selling opportunities
- Recognize new opportunities to market and position products to improve service and sales
- Develop and enhance industry and product knowledge to effectively communicate and build credibility with advisors
- Develop a thorough understanding of all systems and resources to enhance the advisor experience
- Provide training, assistance and promotion to advisors in utilizing system and available platform resources
- Assist with data analytics to support sales and marketing effort

### Experience/ Qualifications

- Bachelor's degree required
- 3+ years' relevant insurance industry experience (Preferred)
- Understanding of how life insurance products can be designed and utilized to meet the needs of clients (Preferred)
- Strong interpersonal and customer service skills
- Excellent problem-solving skills and attention to detail
- Excellent presentation skills, both in creation and delivery
- Articulate and persuasive communicator (both written and oral)
- Enthusiastic team player who can work independently as well as in the team environment
- Self-starter attitude and strong desire to provide excellent results
- Willing to take initiative, exhibit creative thinking and take ownership of cases/projects
- Proficiency in Microsoft Office Suite (Advanced Excel preferred)
- Motivated to continually learn and grow
- Capable of conducting oneself with a focus on service excellence, fair dealing, and client-first decision making with effective time management skills to manage daily workflow

FAIU offers growth opportunities, a flexible work schedule, and a competitive benefits package. To apply, Email resume to [jbolio@faiu.com](mailto:jbolio@faiu.com)