



*ViaForte provides sophisticated insurance solutions to affluent individual and business clients of Integrated Wealth Management Firms. We are a member firm of the M Financial Group and offer a unique perspective in understanding and implementing complex solutions with insurance products and advanced planning techniques.*

### **Job Title**

Insurance Case Manager

The Insurance Case Manager provides product, presentation, in force management, underwriting, and administrative support in the implementation, design, and servicing of insurance related plans for clients of ViaForte. This role will assist in further development and implementation of the ViaForte client experience, maintain the client database, enhance client presentations, maintain vendor relationships, and assure all client servicing needs are being met.

### **Summary of Responsibilities**

#### **Essential Functions**

- Case Design:
  - Understand Insurance Company products and resources to run illustrations to determine most appropriate insurance solutions for clients. Coordinate with Senior Insurance Advisor, M Financial, and Insurance Carriers.
- Case Manager
  - Work with Underwriter, Insurance Carrier, Senior Insurance Advisor to assure process from presentation to policy issue is completed in a timely, efficient manner.
- Underwriting
  - Process E Underwriting for all term cases. Work with Senior Underwriter on all cases in process to efficiently move cases through to issue.
- Administration
  - Prepare all applications for submission to carriers.
  - Upon policy issue, finalize all delivery requirements to place policy in force.
  - Coordinate all client requests, policy changes, premium payments, death claims, and servicing requests.
  - Maintain producer and firm licensing requirements, CE, and contracting with various companies, M Financial, and states.
- In Force Management
  - Utilize CRM, Carrier downloads, In Force illustrations to assure policy is performing as planned and prepare presentations and information to Advisors to update and communicate current policy information.
  - Administration of ILIT policies in coordination with individual or corporate trustees.

1700 West 82<sup>nd</sup> Street, Suite180, Bloomington, MN 55431

phone: (952) 314-7300 fax: (952) 314-7299

Securities offered through M Holdings Securities, Inc.,  
a Registered Broker/Dealer, Member FINRA/SIPC.

ViaForte is independently owned and operated.



***Minimum Candidate Requirements***

- 4 year degree, preferably in finance, economics, business administration or related field
- Minimum of 3 years of experience in insurance or plan administration industry
- Experience with the analysis and administration of insurance products preferred
- Advanced proficiency in MS Office and CRM (Salesforce) software required
- Proven advanced analytical acumen and understanding of financial concepts
- Life and Health License
- Strong attention to detail with ability to organize, prioritize, and manage multiple tasks within set deadlines.

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