



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 Marketing and Administrative Support Specialist

This role is responsible for providing general marketing and administrative support to the Via Forte team, clients, and vendors. This includes coordinating, prioritizing, routing, and executing a variety of tasks as directed by the Sr. Insurance Advisor.

Essential Functions

- Administrative Support:
 - Serving as the initial point of contact, fielding and appropriately routing all phone correspondence for the Via Forte Team.
 - As the initial and primary point of contact for the firm, representing the highest and best version of the Via Forte brand to clients, vendors, and business partners.
 - Data management, administration, and maintenance of all Salesforce CRM processes
 - Receiving, prioritizing all Via Forte correspondence
 - Fielding client and advisor questions, gaining feedback from subject matter experts, and following up with clients as directed
 - Performing basic case management support responsibilities as directed and reviewed by the Via Forte Team
 - Collecting client information and ensuring the completion of client reviews
 - Mailing completed policies and tracking progress
 - Processing an array of general administrative tasks including and not limited to mailings, client data changes, and caring for the physical workspace of Via Forte
- Marketing Support
 - Responsible for the day to day coordination of the term life renewal program
 - Performing marketing activities related to the sales of disability and term life insurance
 - Tracking business development activities and relationships in Salesforce CRM
 - Serving as liaison between NATCO and advisors to ensure premium funding availability
 - Regularly produce the agenda and serve as documentarian for Via Forte Team meetings
 - Supporting the completion of generalist projects as directed

Minimum Candidate Requirements

- Undergraduate degree or equivalent work experience preferred
- Minimum of 3 years of experience in insurance sales or plan administration industry
- Minimum of 3 years administrative or marketing support experience required
- Proficiency in MS Office and CRM (Salesforce) software required
- Proven ability to provide a high level of consultative service to a broad range of clients
- Strong attention to detail with ability to organize, prioritize, and manage multiple tasks within set deadlines.