

Client Care Representative

Job Description (Licensed Client Care Representative - Medicare)

Title: Client Care Representative

Transportation: Car encouraged, but public transportation available

Job Summary

Our Client Care Representative would be responsible for providing a wide variety of administrative and operational support services for an assigned area of responsibility to ensure that clients and other visitors have a pleasant, satisfying, and courteous experience with American Retirement Advisors (via telephone and in person).

Summary of essential job functions

- **Greets clients and visitors and directs them accordingly**
- **Obtains authorization as needed to process clients for services needed**
- **Admits clients into system or manually in accordance with client company protocol**
- **Explains all required paperwork and forms to clients and ensures proper completion of all paperwork**
- **Answers incoming telephone lines in accordance with company procedures and directs the caller accordingly**
- **Files paperwork and correspondence according to defined company procedure**
- **Follows HIPPA guidelines and safety rules as outlined in training received**
Producers Life Health Accident and Sickness

Minimum Requirements

Must hold a Producers Life, Health, Accident and Sickness license
General office and customer service experience.
Familiarity with Microsoft Word Outlook, and Excel.
General knowledge of computer and office equipment.
Attention to detail is crucial.
Accurate spelling and solid verbal and written communication skills.
POSITIVE ATTITUDE is a must.
Professional attire required daily.

About the Company

www.AmericanRetirementAdvisors.com

American Retirement Advisors is a multifaceted healthcare and retirement planning firm based in Scottsdale, Arizona. The firm has four specialized practices. Healthcare Planning, Long Term Care Planning, Legacy and Life Planning as well as Retirement Income Savings. Our growing team of advisors, client care specialists and planners provide the tools for people to navigate the complexities of retirement. David P. Schaeffer founded the firm in 2001 as American Senior Advisors and later updated the company's name to more closely describe their purpose. The firm was just invited to participate in INC Magazines fastest growing privately held companies in America. Additionally, FORBES Magazine included a feature on the company in May of 2014. American Advisors success is directly linked to the ability of the firm's staff to take the complex and make it insanely simple. Providing financial certainty is our mission. Making healthcare and retirement planning "123 Easy" is what we do.

Additional Information

Work Environment: Relatively small, high energy office setting where you will have a large impact on business process.

