



We are currently seeking a career minded team player to join the premium accounting unit as a Banking Specialist. This is an entry level, temp to perm position, offering growth potential. The ideal candidate will be extremely detail oriented with an aptitude for working with numbers and a strong work ethic. If you are interested, please contact Leading Edge Personnel at 210-590-0600 to schedule initial interview and assessments. Please tell them you were referred by the home office website.

Position Summary/Objective

Under general supervision, records and reports all premiums received and expenses disbursed by a home office. Collects and codes transactions for entry into an online accounting system. Interacts with home office staff and certificate owners' requests dealing with annuity benefit checks, loans and dividends. Requires intermediate clerical skills including: keyboarding (50 wpm), 10 key (5000 ksph), filing, copying, scanning, faxing, proofreading, researching, etc., and intermediate knowledge of various software programs to include: Microsoft Word, Excel, PowerPoint and Outlook . This position requires resourcefulness, a professional demeanor, and the ability to juggle many tasks at once. Position requires basic knowledge of company products, the ability to interpret policy provisions, and knowledge of administrative practices relating to company procedures. Maintains workflow and quality control in accordance with established procedures and guidelines.

Essential Functions

- Process and perform necessary job responsibilities for ACH and certificate loan bank drafts.
- Receive payments (direct premium billing, mortgage loan payments, investment funds, etc.) from customers, records necessary information, and prepares bank deposits.
- Receive daily reports, reviews, verifies, balances, and processes changes.
- Process daily ACH return items report by reversing monies or correcting banking information and sending notification letter to customers.
- Balance and post daily EFT funds transfer report, including commissions, mortgage, and director's checks, requesting edits or updates for bank transmittal.
- Process requests received from O by submitting additional EFT funds transfer to the bank.
- Maintain and organize filing of reports into binders for record keeping management.
- Receive training in various job duties in the department that may not be performed on a daily basis.
- Backup team members in the unit/department.

Competencies

- Accountability
- Adaptability/Flexibility
- Coachable
- Communication(Oral & Written)
- Computer Skills-Intermediate
- Customer Oriented/Service
- Job Knowledge
- Quality Output
- Team Mindset

Supervisory Responsibility

This position has no direct supervisory responsibilities.

Work Environment

This job operates in a professional office environment. This role routinely uses standard office equipment such as computers, phones, photocopiers, and fax machines.

Physical Demands

This is a largely sedentary role, must be able to remain in a stationary position at least 50% of the time. Filing, printing, faxing, scanning and copying is required; this requires the ability to move about the office and position self to access equipment and file cabinets, transport items (files, box of paper, etc.) weighing up to 20 lbs., and ascend/descend step ladder/stool as necessary. The position requires extended hours in front of a computer screen and operation of a computer and other office equipment such as a calculator, and copy machine. This position requires the ability to communicate and exchange accurate information via telephone and in person.

Hours of Work

This is a full-time position. Regular office hours are Monday through Friday, 8:00 a.m. to 5:00 p.m., Friday, 8:00 a.m. to 3:00 p.m. Evening and weekend work may be required as job duties demand. This position requires face to face and in-person interaction and requires the incumbent to be in the office during regular office hours to access information kept on-site.

Travel

No travel is required for this position.

Required Education and Experience

- High school Diploma
- Minimum one year related experience
- LOMA Level 1 Certification (281 & 291), required as part of initial training plan

Preferred Education and Experience

- Some College or Insurance Designation or License
- Bilingual (English/Spanish)
- Minimum two years related experience and one year experience within the life insurance industry