



Product Filing Analyst II

SUMMARY:

Using critical thinking and interpretation skills to review new life insurance state rules and regulations. Correspondence with state insurance department personnel to discuss policy language and other compliance requirements. Assists in developing a filing strategy based on internal company needs and life insurance state insurance laws and regulations. Manages assigned filings. Reviews marketing material, identifies and files advertisements as required. Performs some coding input for form information.

ESSENTIAL DUTIES AND RESPONSIBILITIES include the following and other duties may be assigned

- Maintains a current and thorough understanding of existing and new state laws and regulations as related to the position
- Ability to create, maintain, and organize spreadsheets and other documentation
- Manage specific assigned filings, resolving issues that arise and maintaining workflow balance
- Communicates and corresponds with state insurance department personnel regarding compliance issues to policy form filings and any other related issues of compliance
- Develops and maintains a current and thorough understanding of all products marketed by the company
- Completes peer reviews of various documents
- Coding input for form information
- Specialized research and other special projects as assigned
- Drafts, reviews, and files life insurance policy forms and supporting documentation
- Reviews marketing and advertising material. Prepares filings as necessary
- Reviews accounting ledgers created for filing fees and approves them daily

EDUCATION, WORK EXPERIENCE and TRAINING REQUIREMENTS:

- High school diploma or general education degree (GED)
- LOMA designation of ALMI or FLMI is preferred
- LOMA designation of FLMI Level I certificate required within one year of hire date (company paid courses)
- A basic life insurance knowledge and understanding is strongly preferred
- At least four years of strong administrative work experience, preferably in a compliance/product filing related role within the life insurance industry

KNOWLEDGE, SKILL and ABILITY REQUIREMENTS:

- Well organized, efficient, and able to work independently in the home office or in a remote environment
- Strong critical thinking and analytical skills, with the ability to creatively resolve issues that may arise
- Effective oral and written communication skills producing work that is reliable and consistently error free
- Ability to prioritize tasks appropriately, work simultaneous tasks, and switch between tasks with a focus on meeting internal and external deadlines
- A friendly, positive, learning-oriented attitude with the ability to build good working relationships and communicate effectively with people at every level of the organization
- Proficient in Microsoft Office software, LIFE-COMM experience useful
- Conducts Company business in accordance with all applicable laws, regulations, and contractual obligations. Behaves ethically and with integrity and always follows the principles of the Compliance Program when making business decisions. Compliance with this program is a condition of employment for every American-Amicable employee

WORKING CONDITIONS, PHYSICAL and MENTAL REQUIREMENTS: The working conditions, physical and mental requirements described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Work is sedentary in nature and is performed in a traditional office environment with cubicles. Typically, the incumbent will sit comfortably while performing the work, with some walking, standing, bending and carrying of light items, such as papers, books, and files. Other physical demands in performing the essential functions of this position include: digital dexterity, hearing, seeing, and talking. Mental requirements include, but are not limited to, the ability to concentrate, take initiative, cope with stress, adapt, and stay alert in a business environment.

Note: This job description reflects a summary of the job and does not prescribe or restrict the responsibilities that may be assigned. This job description is subject to change at any time.