

Job Title: Member Service Associate  
Department: Operations  
FLSA Status: Non-Exempt  
Date: August 1, 2025

**Summary**

The Member Service Associate assists our members with initial claims calls, member information changes and maintenance (address updates, change of beneficiary), answers incoming telephone calls, collaborates with team members to ensure a positive 1891 experience for our members. This position will also assist other departments with various special projects including administrative and research tasks.

**Essential Duties and Responsibilities** include the following:  
(Other duties may be assigned.)

- Nurtures the relationship with members to enhance and strengthen the relationship between the client/member and the organization.
- Share basic policy information with members
- Process death claims from beginning to end – work with the beneficiaries and members to guide them through the claims process, process claim documents in compliance with state guidelines and ensure timely claims payments with a high level of accuracy; Guide members through the change of beneficiary process, update member contact information in the system
- Evaluate legal documents (Power of Attorney, Trust documents, etc.) and maintain the appropriate documents in member files
- Intake and organize incoming mail and scan/file the forms in their respective
- Utilize Salesforce to track phone calls, emails and correspondence with all members
- Perform special projects as requested by various departments
- Provide guidance to members regarding Partial and Full Surrenders, Minimum Required Distributions, Maturities and Loans
- Input special notes into policy administrative software (Fimmas) to maintain up to date critical information about membership information
- Maintain effective communication and working relationships with all employees
- Any additional duties will be assigned as proficiency increases in current role
- Timely, update and maintain the processes and procedures documents of the member services desk
- Weekly meetings with team to discuss all matters to resolve issues.
- Other duties as assigned

**Supervisory Responsibilities**

None

**Qualifications**

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Demonstrated Customer Service skills
- Strong attention to detail
- Must have exceptional organization and time management skills.
- Knowledge of Office 365

- Knowledge of Salesforce or Customer Relationship Management software
- English/Spanish Bi-Lingual is a plus but not required
- Demonstrated administrative skills including filing and data entry

### **Education and/or Experience**

- High School Diploma or equivalent
- 2+ years of Customer Service Experience in a professional environment
- 1+ years of Insurance Industry experience is helpful but not required.
- Life Insurance license is a plus but not required

### **Communication Skills**

Ability to read and analyze certificates and policy documents. Ability to respond to common inquiries or complaints from members.

### **Mathematical Skills**

Ability to calculate simple math figures and amounts such as discounts, interest, and percentages.

### **Reasoning Ability**

Ability to solve practical problems and deal with a variety of concrete variables in situations where only limited standardization exists. Ability to interpret a variety of instructions furnished in written, oral, diagram, or schedule form.

### **Computer Skills**

To perform this job successfully, an individual should have knowledge of Microsoft Suite; specifically Word and Excel. This role frequently uses Outlook and Salesforce as well.

### **Physical Demands**

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- While performing the duties of this job, the employee is regularly required to sit; use hands to finger, handle, or feel; reach with hands and arms and talk or hear.
- Employee may occasionally be required to lift and/or move up to 15 lbs.
- Specific vision abilities required by this job include close vision and distance vision.

### **Work Environment**

The work environment characteristics 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.

- While performing the duties of this job, the employee is in a typical office environment.
- The noise level in the work environment is usually moderate.
- Expected to perform responsibilities in a consistent, professional manner while exercising strong verbal, interpersonal and quality service skills.

Employee Signature: \_\_\_\_\_ Date: \_\_\_\_\_