



JOB DESCRIPTION

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| Job title: | Junior Client Account Advisor |
| Reporting to: | Senior Client Account Advisor |
| Location: | CGI Tower, Warrens, St. Michael |
| Closing Date: | July 14, 2017 |

The Company

Amphora Financial Group is a financial services provider which currently comprises Amphora Bank & Trust Corporation, Amphora Life Insurance Company Ltd., Amphora Management Services Limited and Amphora Captive Insurance Managers Limited. These companies are established in Barbados and provide a wide array of high quality services including life insurance products geared towards high net worth individuals, trust administration services and the management of captive insurance companies and other companies.

Main purpose of job

Responsible for a portfolio of life insurance clients.

Responsibilities and Duties:

- Data entry and reconciliation of investment transactions for life insurance client portfolios
- Update policyholder records ensuring premiums paid on a timely basis
- Ensure reinsurance calculated accurately, cession forms delivered to reinsurer and reinsurance premiums paid on time
- Ongoing correspondence with clients and client advisors
- Maintain record confidentiality
- Assisting in ordering medical tests and other underwriting requirements for insurance applicants
- Receive and file medical results and other information gathered
- Manage requirements checklist and follow up on outstanding information

Level of responsibility

The position requires a high level of integrity and commitment to best serve the clients' needs is therefore required.

Other requirements:

- The ideal candidate must have a Bachelor's degree in Finance or Business Administration and a background in client service
- He or she must demonstrate excellent communication and interpersonal skills
- Knowledge of the life insurance industry would be an asset

- Must demonstrate attention to detail
- To exhibit initiative and be proactive with any suggestions for improvements to the case management process and any other investment processes
- To be trained to become proficient in the various software packages used in the life insurance underwriting/case management process
- To be trained to become proficient in the use of Axys investment management software
- Other duties that may be assigned from time to time

Knowledge with these Software packages would be beneficial:

- Microsoft Word
- Microsoft Excel
- Microsoft Outlook

Working conditions

Office hours are from 9.00 am to 5.00 pm Monday through Friday.

Amphora Group is part of the financial services community and additional hours are required from time to time depending upon the cycle of work or client requirements. The Group is primarily concerned with meeting the customer's needs within a professional environment and allow employees leeway as to beginning and ending hours, within this context.