



<b>Job Title:</b>	Agent Commissions Specialist	<b>Reports To:</b>	
<b>Job Tier:</b>	Individual Contributor		
<b>Division:</b>	American Amicable	<b>Department:</b>	Choose an item.
<b>Location:</b>	Waco, Texas; Remote	<b>Sub Department:</b>	Agent Commissions
<b>Position Type:</b>	Regular, Full Time	<b>FLSA Status:</b>	Non-Exempt

**Job Description**

**POSITION SUMMARY**

Assist in handling all functions of commissions, advanced and as earned, for sales organizations and individual field agents.

**ESSENTIAL DUTIES**

- Processes daily advances to agents through the automated advancing system in accordance with the agent contract.
- Answers phones, chats, emails and assists in obtaining information requested by agents, department Supervisor and Managers as well as Marketing VP's.
- Loads advance codes to new agent records.
- Loads and maintains bank information records for direct deposits of agents.
- Assists in processing exceptions to standard advancing in accordance with manager requests upon approval.
- Works items from the department mail management system.
- Counsels agents regarding account information on 1099's.
- Calculates commissions on old and new policies for replacements. Adjusts new policy accordingly.
- Prepares entries necessary to void and issue credit balance checks for commissions.
- Coordinates the mailing and special handling (tax levies, etc.) of agents' statements and checks.
- Balances "Agent Unknown" and "Commission Default" accounts for all companies.
- Prepares special month-end deposits for fees and reimbursements.
- Makes miscellaneous accounting entries.
- Handles recovery of lead costs from agents for field management.
- Provides back up for all duties of other members of the Commissions team.

**EDUCATION, WORK EXPERIENCE AND TRAINING REQUIREMENTS**

- High School diploma or general education degree (GED).
- Previous insurance, accounting/finance, or customer service industry experience preferred.

**KNOWLEDGE, SKILL, AND ABILITY REQUIREMENTS**

- Strong computer/MS Office skills; ability to learn other software systems quickly.
- Knowledge of company products or ability to quickly learn.
- Strong attention to detail.

**KNOWLEDGE, SKILL, AND ABILITY REQUIREMENTS (CONTINUED)**

- Strong written and verbal communication skills.
- Solid research and problem-solving skills.
- Ability to perform under pressure and manage multiple projects.
- Ability to analyze and think critically.
- Ability to keep work well organized and prioritize well.
- Ability to receive direction and work with supervisors well.
- Ability to work independently as well as function effectively as a team player.
- Ability to adapt well to change, both procedural and organizational.
- A positive, learning-oriented attitude.

**WORKING CONDITION, PHYSICAL AND MENTAL REQUIREMENTS**

At iA American, we support and celebrate diversity. We strive to provide a workplace that is recognized as inclusive for all, regardless of ethnic origin, nationality, language, religious beliefs, gender, sexual orientation, age, marital status, family situation, or physical or mental disability.

The incumbent must be able to perform the essential functions of the position satisfactorily and, if requested, reasonable accommodations will be made in compliance with ADA and EEO regulations to enable employees with disabilities to perform the essential functions of their job, absent undue hardship.

**IMPORTANT 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.

<b>Prepared By:</b>	Brady Kaufmann, Manager – Marketing Operations	<b>Date:</b>	12/1/2022
<b>Approved By:</b>	Andrea Gunnels, Sr. HRBP	<b>Date:</b>	12/5/2022
<b>Last Updated By:</b>	Andrea Gunnels, Sr. HRBP	<b>Date:</b>	12/5/2022