



Account Manager – Asset Unit

The Pangburn Group

Education Requirements: Bachelor's degree in Business, Finance, Economics, Accounting, Math or equivalent

Location: Headquartered in New Roads, Louisiana; Remote and/or hybrid work is available

Experience: 1 – 3 years' work experience in accounting, banking, insurance, mathematics or business related field. Life insurance related work experience preferable.

Duties:

- Responsible for systems set up and operation of insurance plans including but not limited to corporate and bank owned life insurance programs, endorsement split dollar, and loan regime split dollar arrangements.
- Analyze and interpret legal plan documents for effective and efficient setup in database systems
- Audit and process transactional data (e.g., premiums, policy values, policy events)
- Prepare periodic reports for clients and advisors
- Prepare ad hoc reports for events such as termination, death, and policy surrender
- Analyze plan and program operations with for compliance with applicable regulations
- Interpret and explain accounting entries for insurance plans and programs, and ability to support calculations provided
- Communicate with insurance home office service representatives and internal team members efficiently and effectively to request policy information, stay abreast of policy changes, and troubleshoot issues to ensure that the plans and programs operate properly
- Effectively communicate with internal and external parties to resolve issues
- Maintain internal client records (e.g., records of events, quality-control documentation) with a high degree of organization and attention to detail
- Participation in and/or coordination of projects to improve systems and/or procedures

Required Skills:

- Ability to learn, understand, and communicate complex tax and regulatory issues pertaining to insurance plans and programs
- Maintains 100% confidentiality with regard to corporate, client, and vendor information
- Proficient in Excel, Word, and PowerPoint
- Prioritizes and performs multiple tasks simultaneously by establishing priorities, planning ahead, and anticipating potential issues in order to meet deadlines and client expectations
- Pays careful attention to detail and accuracy ensuring that all deliverables meet client expectations
- Self-motivated and takes initiative
- Models high ethical standards; establishes and maintains all business relationships on the basis of integrity & trust



It is through engaged employees, valued client relationships, great benefits, and a dynamic culture balancing hard work and fun, that The Pangburn Group has gained this distinct honor. If you are looking for a challenge and a great environment to call home, this is a unique opportunity not to ignore.

The Pangburn Group is an equal opportunity, at will employer and will not tolerate discrimination or harassment on the basis of race, color, creed, religion, age, sex, veteran status, sexual orientation, marital status, medical condition, physical or mental disability or any other basis protected under applicable federal, state, or local law.