

JOB DESCRIPTION

Job title:	Junior Client Account Advisor
Reporting to:	Senior Client Account Advisor
Location:	Amphora House, Warleigh, St. Peter
Closing Date:	January 18, 2023

The Company

Amphora Financial Group is a financial services provider comprised of 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 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

The Candidate

The successful candidate should:

- Have a university degree in Finance or Business Administration
- Have a background in client service
- Have strong interpersonal skills, as well as excellent and verbal and written communication skills
- Be task oriented and have the ability to adhere to deadlines and schedules

Knowledge with these Software packages would be beneficial:

- Microsoft Word
- Microsoft Excel
- Microsoft Outlook
- Axys