

**Position: Annuities and Life Insurance Specialist**

Employment Type: Full-Time (40 hours per week)

Schedule: Monday–Friday, 9:00 AM–5:00 PM (In Office)

Base $60,000-80,000, depending on experience

Location: Cornerstone Capital Wealth Management, 5635 Harris Hill Road, Williamsville, NY 14221

**Job Description:**

As part of the Operations Team, the Annuities and Life Insurance Specialist plays a critical role in supporting a full-service financial advisor by managing intricate administrative responsibilities related to annuities, life insurance, and disability insurance. This position demands expertise in application processing, policy documentation, underwriting coordination, and compliance with industry standards. The ideal candidate will excel in providing outstanding client service, assisting the retirement services team, and ensuring efficient policy management, enabling the advisor to concentrate on strategic financial planning.

**Key Responsibilities:**

* Insurance and Annuity Processing:
  + Process and validate applications, transfers, and payment instructions while ensuring accuracy and adherence to company policies.
  + Review, prepare, and distribute contracts and related documents to clients.
  + Resolve inquiries and collaborate with internal teams to address issues related to insurance and annuity processing.
  + Stay informed about insurance and annuity products, services, and regulatory requirements to support proper processing.

**Client Record Management:**

* Perform data entry and maintain client records, ensuring systems and files are updated with current information.

**Retirement Plan Support:**

* Assist with preparing materials for employee education meetings.
* Process enrollment paperwork, beneficiary changes, inbound rollovers, contributions, distributions, loans, and other transactions in accordance with company policies and industry regulations.
* Generate reports, statements, and account summaries for clients and plan sponsors.

