

Job Description – Member Services / Underwriting

- Membership Services
 - Serves as WSA's primary point of contact for member phone calls and correspondence. Requires knowledge of all of WSA's products currently and previously in effect. Requires understanding and applicability of WSA's policies including internal control and AML policies.
 - Claims processing including: death, cash surrender, annuity withdrawals, sick/operation and dismemberment.
- Underwriting
 - Review all applications and obtain medical information as per WSA's underwriting guidelines.
 - Review medical records and determine rating prior to issue.
 - Order examinations as requested by reinsurance company.
- Reinsurance
 - Review monthly invoice for accuracy. Notify reinsurer of certificate terminations as applicable.
 - Submit documents for recovery of reinsurance proceeds (i.e. ADB) as necessary.
 - Submit bulk ADB premium report annually.
- Accounts payable / receivable
 - Responsible for payment of vendor invoices.
 - Responsible for entering insurance and annuity premium payments, certificate loan payments, mortgage loan payments and tenant file payments.
- Balancing
 - Perform daily balancing of receipts and insurance records.
 - Perform, in conjunction with other employees, month and year end balancing procedures.
 - Assist in completion of financial filing schedule pages as requested.
- Fraternal Support
 - Scholarship Program:
 - Responsible for review and initial approval of all applications to ensure they meet Board Scholarship Program guidelines.
 - Ensure appropriate Finance Committee review is obtained, if necessary.
 - Lodge Tracking:
 - Responsible for entry of lodge attendance rosters, LAFP & LAIP requests and other lodge submissions.
 - Junior Department:
 - Provide support to department advisor through dissemination of junior flyers and prompt payment of junior activity invoices.
 - Fraternal Voice:
 - Responsible for assembly of materials for publication and providing these to WSA's third party graphics contractor.
 - Responsible for proof-reading the publication prior to print.
 - Coordinate printing and mailing with Signature Offset
 - Ensure adequate postage is on-record with USPS at all times.