Balefire

Location: Phoenix, AZ | Ridgeland, MS | Minneapolis, MN | Dallas, TX
Department: Insurance | Client Services
Employment Type: Full-Time

At **Balefire Wealth**, we're redefining what it means to be a financial advisory firm. The future of wealth management is collaborative, innovative, and deeply personal—and we're building a team that reflects that vision.

We are seeking an **Insurance Associate** to join our growing Insurance team. This role is ideal for someone who thrives in a detail-driven environment, enjoys problem-solving, and is passionate about delivering concierge-level service to clients, advisors, and carrier partners.

Key Responsibilities

1. Policy & Performance Review

- Review and monitor segment allocations, interest rate returns, new index options, historical performance, and overall average rate of return since policy inception.
- Oversee Systematic Investment Transfers (SITs) and prepare analysis for advisor and client reviews.

2. Policy Servicing & Client Support

- Support plan policies, premium-financed policies, and bank reporting requirements.
- Coordinate annual policy reviews, policy performance reporting, and finance company collaboration.
- Partner with advisors and clients on servicing needs including death claims, policy loans, premium reminders, owner/beneficiary changes, and anniversary notices.

3. Underwriting & Case Management

- Own end-to-end underwriting for Balefire's highest-value and most complex cases.
- Provide concierge-level coordination with carriers, medical vendors, and advisors, ensuring proactive issue resolution and timely updates.
- Collaborate on complex illustration scenarios, product-specific policy loans, and premium strategies (including investment-funded premiums).

4. Process & Compliance Oversight

- Create, document, and refine SOPs for application intake, requirements ordering, risk assessment, and approval communications.
- Conduct quarterly audits to eliminate friction and ensure compliance with firmwide standards.
- Maintain firmwide producer licensing and appointments, track renewals, CE credits, and state filings; coordinate with Compliance on regulatory requirements.

5. Financial & Medical Reconciliation

- Reconcile medical records quarterly, determining payment timing and managing reimbursement processes (in collaboration with Accounting & HR).
- Ensure accurate, timely commission statements by reconciling carrier reports to internal records.
- Partner with Accounting to resolve discrepancies within 10 business days and maintain audit-ready files.

Qualifications

- 2–5 years of insurance, financial services, or related experience preferred.
- Strong analytical and organizational skills; ability to manage multiple priorities and deadlines.
- Excellent client service and communication skills.
- Proficiency in Microsoft Office Suite and CRM platforms (experience with Practifi a plus).
- Active life/health insurance license preferred (or willingness to obtain within 6 months).

Why Balefire

- Collaborative, team-oriented culture.
- Opportunities for professional growth and advancement.
- Competitive compensation and benefits package.
- A chance to shape the future of wealth management with an innovative, people-first firm.

(972) 361-1001 information@balefirewealth. www.balefirewealth.com