

# JOB DESCRIPTION

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**Position Title:** Managing Research Analyst      **Industry:** Life Insurance  
**Reports To:** Managing Partner      **Salary Range:** Competitive

## Company Overview:

LifeTrends® is a dynamic organization which specializes in providing competitive intelligence services to Life Insurance companies, Insurance Marketing Organizations and Brokerage General Agencies. We are a small company that is looking for an exceptional individual who is excited about the growth opportunities that exist within our organization.

## Position Summary:

The Managing Research Analyst will focus on interpreting data, formulating reports and making recommendations based upon the research findings within the life insurance industry. This person will also be responsible for initiating collaboration with our partner carriers, brokerage firms and distribution companies to brainstorm ideas and help to implement new standards for benchmarking products and pricing. The role requires leadership qualities, a combination of strong technical and administrative skill, along with an equal ability to provide a positive customer experience and willingness to establish and maintain relationships with others to achieve a common purpose.

## Essential Job Functions:

- Present Ideas. Collaborate, provide and receive feedback with, to and from our Partners. Engage with them to identify gaps in data, product and/or service offerings. Help them to stay up to speed with current trends and help them take deeper dives into analysis of how products are positioned and sold.
- Tracking and maintenance of various account, rate and product grids, as well as manage state form filings occurring within the industry.
- Create, foster and maintain strong, meaningful relationships with other analysts and other roles within LifeTrends partnering offices, having similar background and experience.
- Maintain and update monthly blog posts, and conduct research relative to industry trends. Assist Lifetrends with the introduction and maintenance of Sales reporting information.
- Solve Problems. Make sound assumptions and be comfortable working in situations where data is incomplete or incoherent. Overcome obstacles and find solutions that best resolve the issue(s) at hand.
- Assist with analysis and function of partnering carrier program and systems which relate to product rules, pricing, underwriting, etc.
- Research relating to various products specific to single premium, premium financed or other potential and advanced sales concepts. Analyze data provided by industry standard organizations, such as LIMRA, to understand relevance and effects of current analysis as well as with future trends.



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## **JOB REQUIREMENTS**

**EDUCATION:** Bachelor's or advanced degree in business, mathematics or the sciences. Equivalent industry experience is acceptable.

**EXPERIENCE:** 8 to 10 years of related professional experience; Experience with a Sales Office (producer, brokerage general agency, insurance marketing organization, producer group) or Life Insurance Company (sales, marketing, product research and development, competitive or market intelligence, pricing) is preferred; Management experience preferred.

**KNOWLEDGE, SKILLS & ABILITIES:** Knowledge of and significant experience with insurance illustration systems and proposals; Strong analytical and technical skills; Mathematically-minded; Knowledge of database systems & Microsoft Excel preferred; Ability to learn and apply knowledge quickly; Ability to manage time and meet stringent deadlines; Ability to propose ideas to improve process and increase efficiency; Customer service-oriented, with desire to engage with clients; Strong sense of self and desire to integrate into a team-oriented environment; Ability to be a leader not a follower.

**TRAVEL REQUIREMENT:** Minimal to none

**TYPE OF POSITION:** Full-Time, Exempt

## ***LIMITATIONS AND DISCLAIMER***

The above job description is meant to describe the general nature and level of work being performed; it is not intended to be construed as an exhaustive list of all responsibilities, duties and skills required for the position.

All job requirements are subject to possible modification to reasonably accommodate individuals with disabilities. Some requirements may exclude individuals who pose a direct threat or significant risk to the health and safety of themselves or other employees.

This job description in no way states or implies that these are the only duties to be performed by the employee occupying this position. Employees will be required to follow any other job-related instructions and to perform other job-related duties requested by their supervisor in compliance with Federal and State Laws.

Requirements are representative of minimum levels of knowledge, skills and/or abilities. To perform this job successfully, the employee must possess the abilities or aptitudes to perform each duty proficiently. Continued employment remains on an "at-will" basis.

***If you are interested in being considered for the position, please submit your resume online - <https://lifetrends.com/about/careers/>.***

