Job Description

LifeTrends

Data Specialist I, Data & Custom Team

Reports To:	Director, Data & Custom	**Salary Range:**	Competitive

Company Overview:

LifeTrends® is a dynamic organization which specializes in providing competitive intelligence solutions through technology and data for Life Insurance companies, Insurance Marketing Organizations, and Brokerage General Agencies.

Position Summary:

If you love working with data and have a strong attention to detail, this role might be for you. The Data Specialist is an entry-level role that's integral to providing our clients with accurate information they use to make important business decisions. After completing our Associate training program, Data Specialists work both independently and with teammates to set up and run life insurance illustration data, ensuring accuracy and optimizing data solutions to meet client needs. They are also responsible to regularly audit our platform for accuracy, troubleshoot data and technology problems and find ways to deliver excellent data solutions to our clients.

Essential Job Functions:

- **Gather, Format and Upload Life Insurance Illustration Data:** Within Service Standard Goals, configure and execute the gathering of life insurance illustrative values by utilizing life insurance carrier software, APIs, Python, Excel and other methods to streamline data input and ensure data uploads flow accurately through the platform.
- **Data Auditing and Quality Assurance**: According to set schedules, regularly audit life data to verify accuracy and integrity. Collaborate with team members to implement updates and enhancements to reflect changes in product illustrative values, interest or crediting rates, or product features/riders.
- **Problem-Solving and Troubleshooting**: Troubleshoot technology issues and resolve data discrepancies, ensuring consistency and reliability across the platform. Partner with team members and/or the technology team to develop solutions for data processing or integration issues.
- **Communication**: Provide clear and effective communication about data workflows, processes, and error resolution steps. Respond professionally, clearly and accurately to client emails regarding data projects and requests.
- **Client-Focused Solutions:** Continuously seek ways to improve the data-driven experience for clients. Work with LifeTrends Leadership to evaluate and implement innovative technology solutions that help deliver a high-quality, reliable data experience to our clients.
- **Documentation and Reporting**: Maintain thorough documentation of data processes, system updates, and troubleshooting steps. Regularly report on individual performance to help support team and company goals.
- Continually grow Life Insurance knowledge by actively participating in training, researching relevant industry topics, and being a student of our industry.
- Maintain the LifeTrends' core values

Job Requirements:

Education: Associate's or bachelor's degree in math or related fields (computer science, economics, etc.) or equivalent training is preferred but not required.

Experience: 1+ years of related experience with some knowledge of insurance, financial services or data-related industry. Complete a 5-month Associate training program or demonstrate the ability to effectively perform all Associate-level responsibilities.

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Knowledge, Skills & Abilities:

- **Analytical & Problem-Solving Abilities**:
    - Strong analytical skills with the ability to identify, troubleshoot, and resolve data discrepancies or system errors.
    - Highly organized and able to independently complete project tasks.
    - Able to prioritize tasks to balance speed with quality, identify urgency with deadline-driven tasks arise.
    - Detail-oriented and able to work with large datasets while maintaining high levels of accuracy.
    - Mathematically proficient
- **Technical Skills**:
    - Familiarity with Python, Excel, VBA or API technology (or ability to learn) to integrate and process data from external sources.
    - Desire for a role in data management.
    - Experience with data visualization and reporting tools (e.g., Excel, Tableau) is a plus.
- **Communication & Collaboration**:
    - Excellent written and verbal communication skills.
    - Ability to work independently, as well as collaborate effectively with cross-functional teams.
    - Courage to speak up and call attention to issues or conflicts.
- **Desirable Skills**:
    - Knowledge or instruction of life insurance policy structures, interest crediting, and other relevant financial products.
    - Familiarity with data automation tools, version control (e.g., Git), or cloud platforms (e.g., AWS, Azure).

Travel Requirement: If not in Austin area, 3-5 days/year, as needed, for all-company events

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 apply in our careers section on our website: https://lifetrends.com/about/careers/