Position Title:	Case Design Analyst
Position Location:	Needham, MA
Reports to:	Tracy Fitzsimmons, Director

Firm Summary:

Tenzing Insurance Strategies is a boutique firm focused on life insurance analysis and placement in the estate planning marketplace. We analyze and design life insurance strategies to preserve wealth, efficiently transfer assets and provide financial security for individuals and families.

Position Summary:

The primary functions of the Case Design Analyst are to: (1) create presentations to assist clients as they make decisions about the composition, structure, and funding of new life insurance portfolios, and (2) assist in optimizing the performance of clients' existing life insurance portfolios.

This role prepares client presentations primarily in Excel, with a goal of bringing simplicity and clarity to complex concepts. The successful Case Design Analyst will be able to manage and prioritize multiple projects. Strong analytic and organizational skills are essential, as well as a willingness to develop a deep understanding of all types of individual life insurance products. The person should be a team player, intellectually curious and willing to discover and implement new methods.

Position Responsibilities:

- Gather information for new cases
- Understand, illustrate, and present a range of life insurance products, primarily from major life insurance companies partnering with M Financial (John Hancock, Lincoln, Nationwide, Prudential, Pacific Life, Penn Mutual, Prudential and Symetra)
- Prepare complex and technical Excel presentations for clients and advisors
- Learn and model strategies utilized to fund life insurance in a gift tax efficient manner
- Understand the income tax attributes of life insurance, and how changes in tax and other legislation will impact our analyses
- Learn and incorporate basic fundamentals of estate planning
- Model alternatives for optimizing the performance of existing life insurance portfolios
- Construct portfolio recommendation options based on numerous moving parts, e.g. insurance company pricing and product changes, underwriting results and changes, and tax and legislative changes
- Spot trends and patterns present in analytics, identify the source of counter-intuitive patterns, and be prepared to explain the patterns to the marketing team
- Communicate complex financial information in a clear and concise manner
- Perform inforce policy reviews, comparing original goals to emerging results and new assumptions

Candidate Requirements:

- Bachelor's Degree (Economics, Finance, or Mathematics preferred)
- Proficiency in Microsoft Excel, Outlook and Word
- Superior financial mathematics aptitude
- Strong ability to understand, evaluate, and present technical and analytical information in a concise and clear manner
- Strong presentation skills
- High attention to detail
- Effective listener and communicator
- Ability to prioritize and meet deadlines
- Ability to work well both independently and in a team environment
- Critical reviewer and creative thinker
- Willingness to learn technical aspects of life insurance products and strategies
- Willingness to pursue working knowledge of estate planning and tax laws
- Positive, can-do attitude
- Strong work ethic and commitment to the highest standards of excellence
- Strong sense of accountability and ownership of his or her work

Additional Opportunities for Employees:

- Traditional and digital marketing experience
- Relationship and case management development
- Sales training