



Job Title: Project Manager (Accounting & Insurance)

Department: Consulting

Reports to: Insurance Department Leader

Level: Full Time; Exempt

Location: Jeffersonville

Last updated: 09/2020

Summary of Responsibilities:

The Project Manager will work closely with Accounting Services and Insurance Services Project Manager(s) to provide accounting and captive insurance management services and support for our clients in the insurance industry. The PM will also assist in an administrative project management capacity spearheading projects around accounting systems and processes. Responsibilities may change as deemed necessary and appropriate but will focus on accounting and financing transactions for insurance companies. This is a dynamic role with high expectations.

Essential Functions:

- To be accountable for client projects and deadlines
- To assist with accounting and general business functions for our insurance clients (general ledger accounting and analysis, regulatory and management reporting, premium taxes, business meetings (Board/committee), certain system development assistance and testing)
- Coordinate with the Insurance Services Leader regarding client service project management, as appropriate
- Maintain workload that provides an average of 90% productivity (depends on position & level)
- Prepare and file insurance financial statements, provide general ledger accounting support, and annual registration and renewal of required regulatory filing forms
- Assist with insurance underwriting and premium rating functions in compliance with client guidelines (accumulate information and analyze financial information)
- Maintain corporate governance files and organize/schedule updates and renewals
- Calendar management and scheduling for client as it relates to company-wide meetings (client will dictate level of involvement)
- Organize, plan and assist in the execution of all facets of client events (Board Meetings and Conferences) as requested by client including hotel & travel, meals, materials, etc.
- Administer scheduling and act as project manager for one or more client committees
- Perform monthly general ledger accounting & analysis and manage Accounting Services bookkeeping functions, as needed.
- Develop technical expertise around statutory and US GAAP accounting for insurance companies
- Prepare and index working papers
- Assist with financial compilations and insurance related regulatory filings and reporting



- Complete special projects as requested by client or Insurance Services
- Actively establish plans to meet deadlines in advance and maintain accountability for self and client-assigned tasks keeping Manager informed of progress.
- Actively seek most efficient approach in adding value to jobs eliminating wasted, non-value-added tasks.
- Other duties assigned as needed

Education, Experience, and Skills:

- Bachelor's Degree in Accounting (Accounting preferred) from an accredited college or university required, minimum of 3-5 years related experience
- Active CPA license preferred but not required
- Adherence to strict confidentiality
- Attention to detail is crucial
- Proven, strong organization capabilities
- Able to manage multiple projects/timelines
- Proficiency in various Microsoft Office Suite software including but not limited to Excel, Word, Power Point as well as other commonly used applications such as Adobe, Outlook etc.
- Self starter
- Working experience with Executive Leadership and an understanding of general corporate governance processes
- Prior insurance accounting experience would be helpful, but not required as we have a strong training program for anyone meeting the above experience requirements

Expectations:

- Respect and earn the respect of fellow team members
- Strong interpersonal and communication skills
- Communicate and handle incoming and outgoing electronic communications on behalf of client and Firm in a competent and professional manner
- Team oriented
- Possess good judgment and intuition
- Strong execution skills
- Able to occasionally travel as requested for client meetings (very limited travel-currently estimated at 10-15%) note: currently none due to COVID-19
- Ability to prioritize, manage and provide solutions when issues arise
- Take ownership of identified processes and responsibilities
- Keep open communications with manager, team and leadership
- Dependable
- Make informed decisions – discuss with Manager when needed
- Interact with all levels of staff acting as a liaison for the client as needed
- Grow and learn from past mistakes
- Work in a safe, clean and employee friendly atmosphere
- Work personal/professional development plan



- Must have some flexibility with work schedule (occasional nights/weekends)

Working Conditions:

- Minimal hazards
- General office working conditions
- Occasional heavy lifting
- Periodic evening and/or weekend work

We are committed to providing equal employment opportunities to all employees and applicants without regard to race, ethnicity, religion, color, sex (including childbirth, breast feeding and related medical conditions), gender, gender identity or expression, sexual orientation, national origin, ancestry, citizenship status, uniform service member and veteran status, marital status, pregnancy, age, protected medical condition, genetic information, disability or any other protected status in accordance with all applicable federal, state and local laws.

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