



Employee Benefits Account Representative Program

January and July 2025

Join an innovative leader in insurance brokerage and consulting.

Explore a Career with USI

Are you – or do you know – a recent college grad, eager to gain new skills and experience in insurance brokerage and consulting? USI Insurance Services' Career Track program offers new associates hands-on experience and opportunities to learn the skills necessary to effectively deliver exceptional customer experiences and succeed in an increasingly competitive market.

The Employee Benefits Account Representative Program provides in-depth training to prepare associates for client-facing and customer-oriented roles. Throughout the training program, associates join a mentorship business group, led by industry experts, to further develop skills while increasing role-specific levels of responsibility.

The program also offers organized activities for participants to meet senior executives and network with team members across business lines, as well as opportunities to get involved through our USI Gives Back campaign, where each of the company's approximately 200 offices volunteer in local community service.

What You'll Learn

You will be immersed in the fundamentals of employee benefit consulting including:

- The USI ONE Advantage® processes and best practices, a key differentiator between us and other brokerages
- Broad based insurance knowledge and expertise
- Guidance and support around appropriate licensing, certifications, and designations
- Strategies to help clients align benefit packages to fit their vision and values
- Fundamentals of employee benefit programs
- Core benefit consulting cadence; the life cycle of a client
- Inter-office collaboration via group projects
- Tools and skills to support the service team with client deliverables
- Networking and relationship-building skills
- Professionalism and soft-skills development

Program Overview

The Employee Benefits Account Representative Career Track Program provides over 1,200 hours of formalized training sessions and practical hands-on work experience.:

	Training	On the job experience
Months 1-3 100% Training with National Training Team.	Content includes industry knowledge, systems training, and introduction to group project work. Licensing prep and obtaining insurance license will also happen during this time.	Work with sales executives, account management teams, and insurance carriers servicing middle market and large clients with their employee benefits insurance needs.
Months 4-7 50% training, 50% on the job experience as an employee benefits account representative.	Training content includes tax favored accounts, funding strategies, and compliance topics. Understanding and applying shared processes within each phase of the client life cycle begins.	<ul style="list-style-type: none">Provide support to 2-3 Employee Benefits Account Managers. Assist in system maintenance and preparing client communications including open enrollment material.
Months 8-18 20% training, 80% on the job experience.	Training content continues with deeper understanding of client services, renewals, carrier applications, and technical resources.	<ul style="list-style-type: none">Work closely with insurance carriers on information requests such as implementation paperwork and processing renewals.Shadow experienced account management staff and attend meetings to obtain realistic perspective of on-the-job tasks performed.

Candidate Qualifications

- Strong organizational, multi-tasking, and prioritizing skills
- Strong time management skills and ability to meet deadlines
- High attention to detail and accuracy skills
- Ability to follow policies, procedures, and regulations
- Excellent verbal, written, and interpersonal communication skills
- Ability to work effectively, as well as independently, in a team environment
- Strong customer service skills
- Problem solving and critical thinking skills
- Ability to take on a high level of responsibility, initiative, and accountability
- Proficiency in Microsoft Excel, Word, and PowerPoint
- Bachelor's degree achieved between Spring '24 and Spring '25

Program Locations

Opportunities available nationwide.

Express Your Interest
Tell us more about yourself.

Get Started 

