



Employee Benefits Account Representative Program

January and July Start Dates Available Nationwide

Join an innovative leader in insurance brokerage and consulting.

Launch Your 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 through U Network, a peer-to-peer learning platform, and U Mentor, our official one-to-one mentorship program.

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.
- Comprehensive 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.
- 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 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.	Training content includes industry knowledge, systems training, introduction to group project work and licensing preparation.	<p>Work with sales executives, account management teams and insurance carriers servicing middle market and large clients with their employee benefits insurance needs.</p> <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 materials.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.
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.	
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.	

Candidate Qualifications

- Strong organizational, multitasking and prioritization 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 in the last two years.

Express Your Interest
Tell us more about yourself.

Get Started ➤



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