
Gateway Financial Group, Inc.



Rachel Brinchman **Underwriting & Policy Administration**

Office: 412-497-1750
Mobile: 740-513-1745
Fax (secure): 380-388-3336
rbrinchman@gatewayfinancial.biz

Rachel is a contractor with GB Underwriting Services and provides underwriting and policy administration services to the Gateway Financial team. With excellent communication adeptness, and an aptitude for problem-solving, Rachel plays a key role in assisting teammates with issuing new life insurance policies and administering the life insurance once issued, especially as it relates to in-force service tasks. To ensure a seamless workflow, Rachel works with Gateway's team, clients, and carriers utilizing Gateway's procedures to effectively address inquiries and deliver prompt policy service.

Rachel plays a critical role in supporting the underwriting process by ensuring all necessary medical records are obtained, applications are accurately completed, and policies are issued seamlessly and in good order. She collaborates with various life insurance carriers to secure essential documentation, such as service forms, in-force illustrations, and policy values, to provide thorough and accurate servicing of in-force policies. Rachel diligently fulfills policy owner service requests, including beneficiary and ownership changes, term conversions, address updates, and premium administration, ensuring that all updates align with the clients' needs and carrier requirements.

Her responsibilities also include managing key inforce policy tasks, such as sending premium reminders for trust-owned policies, monitoring no-lapse guaranteed premium timing, issuing term conversion or replacement reminders, and addressing lapse notices promptly. Rachel maintains a proactive approach to client service, responding to inquiries efficiently and ensuring that all service-related requests are handled with care. She works closely with carriers to implement requested service changes, meticulously tracking activities, and updating internal CRM systems to maintain accurate and up-to-date records. Through her attention to detail and commitment to client satisfaction, Rachel ensures smooth and dependable policy servicing experience.

Rachel lives in Columbus, OH with her husband James. They are dog parents to a goldendoodle and a shih-tzu. Rachel enjoys staying active, traveling all over the world and spending time with her close family at home.

Education and Affiliations:

- Business Administration, California Coast University
- Client Builder Award, Guardian
- Licenses: LAH

