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| Form Name:       | Katie School Student Opportunity |
| Submission Time: | May 20, 2025 1:09 pm             |
| Browser:         | Chrome 136.0.0.0 / OS X          |
| IP Address:      | 98.214.165.8                     |
| Unique ID:       | 1346076400                       |
| Location:        | 42.0307, -87.8107                |

## Katie School Student Opportunity

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|--|---|
| Company Name                           | BDI Global LLC  |
| Contact Person                         | Adam Niedbalski                                       |
| Title of Contact                       | Operations Manager                                    |
| Email                                  | adamn@bigdatainsure.com                               |
| Phone                                  | (847) 624-7579  |
| Company Website                        | <a href="https://bdi.global/">https://bdi.global/</a> |
| Indicate what opportunity is available | Full-time   |
| Title of Available Position            | Financial Operations Coordinator                      |
| Opportunity Location                   | Skokie, IL  |
| Salary/Wage Range                      | 40,000-48,000   |
| Opportunity Start Date:                | 6/1/2025  |
| Opportunity End Date                   | 7/1/2025  |

## Description of Opportunity

Position Title: Financial Operations Coordinator  
Location: Skokie, IL (Hybrid - In-office 3 days/week)  
Company: BDI Global, LLC  
Contact: Adam Niedbalski - adamn@bigdatainsure.com

### About BDI Global

BDI Global is a Lloyd's of London Coverholder and specialized insurance brokerage developing forward-thinking insurance programs for law firms, healthcare providers, financial professionals, and more. We're a small but growing company that blends smart strategy with high-integrity service - and we're looking for a Financial Operations Coordinator to help power the financial side of our business.

This role is ideal for someone who is organized, collaborative, and interested in growing their career in finance or operations. You'll play a key role in ensuring our agent partners are billed accurately, payments are applied correctly, and that all systems are in sync - supporting both the financial health of our agency and the quality of service we provide.

### What You'll Do

#### 1. Payment Processing & Cash Applications

Log and apply payments from brokers, agents, and partners

Match payments to the correct accounts across our finance and underwriting platforms (Nexsure, Airtable, QuickBooks, etc.)

Investigate and resolve payment mismatches with care and precision

Maintain up-to-date tracking of balances and generate reconciliation reports

#### 2. Monthly Agent Billing & Statements

Prepare and distribute monthly billing statements for our agent partners

Confirm premium, commission, and tax totals are properly calculated

Communicate with agents regarding upcoming payments or statement questions

Support the improvement of billing processes by identifying efficiencies

### 3. Account Follow-Up & Compliance Notices

Monitor overdue accounts and trigger notices of intent to cancel (NOI) or formal cancellation (ITC) when necessary

Draft and send regulatory-compliant notices and track deadlines

Coordinate with underwriting and policy teams to enforce cancellations or resume coverage based on payment status

### 4. Reporting & Financial Support

Assist with internal dashboards and reports for team and carrier partners

Help prepare supporting documents for licensing and compliance

Collaborate with teammates on special projects involving financial data and systems

#### What Makes You a Great Fit

You love organizing, analyzing, and getting things right the first time

You're comfortable with Excel and eager to learn new platforms like Nexsure or Airtable

You're confident explaining numbers and payment details in a way that's clear and professional

You enjoy a good mix of independent tasks and team collaboration

You're reliable and consistent - being in the Skokie office 3 days a week helps keep everyone aligned and supported

#### Qualifications

Bachelor's degree (or in progress) in Finance, Accounting, Business, or a related field

1-2 years of relevant experience - internships, part-time roles, or co-ops welcome

Bonus points for exposure to insurance or agency billing, but not required

#### Career Growth & Why BDI

We're a mission-driven, team-oriented company where your work really matters. You'll gain hands-on experience, mentorship, and

exposure to the behind-the-scenes functions of a fast-moving insurance agency. If you're curious, reliable, and motivated to grow, this is a strong entry point into the world of underwriting operations, finance, or compliance.

We are committed to building a workplace where diverse perspectives thrive, and where everyone - no matter their background - has the chance to contribute meaningfully and grow professionally.

#### How to Apply

Please send your resume and a short message introducing yourself to:

☐☐ Adam Niedbalski

☐☐ [adamn@bigdatainsure.com](mailto:adamn@bigdatainsure.com)

☐☐ Subject Line: Financial Operations Coordinator Application - [Your Name]

We're excited to hear from you!

## Preferred Skills

### Preferred Skills & Attributes

Strong attention to detail and comfort working with numbers

Proficiency in Excel or Google Sheets

Eagerness to learn new systems like Airtable, QuickBooks, and insurance-specific platforms (we'll train you!)

Clear and professional communication skills, especially in writing

Interest in financial operations, compliance, or the insurance industry

A team player who is dependable, punctual, and proactive

Enthusiasm for working in-person 3 days per week with a supportive, collaborative team

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## Please Specify How You Would Like Students to Apply

BDI Global is listed on Handshake and LinkedIn, and we encourage applicants to apply through either platform. You can also apply directly by sending your resume and a short email to:

☐☐ Adam Niedbalski - [adamn@bigdatainsure.com](mailto:adamn@bigdatainsure.com)

☐☐ Subject Line: Financial Operations Coordinator Application - [Your Name]

We look forward to learning more about you and how you can help us grow.

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