

Lawley

INSURANCE | EMPLOYEE BENEFITS

Retirement Account Executive

Position Focus:

- Manage an established book of business, including strategic initiatives, plan review meetings, and acting as a liaison between the client and provider
- Responsible for requesting plan information, coordinating fund and plan design changes, and answering participant questions
- Work with Retirement Consultant to identify and make recommendations that are beneficial to your clients needs during quarterly/annual process
- Build and maintain relationships with clients including plan sponsors, participants and financial professionals in a client facing environment
- Work with Retirement plan providers to prepare proposals and to facilitate presentations for clients, or conduct presentations personally
- Participate in finalist presentations for prospective clients
- Will conduct group employee education meeting to increase retirement plan participation and salary deferrals
- Reach and maintain retention goal of 95% or greater
- Support all Lawley initiatives as requested, guided by company values, sales culture, business needs and scorecard

Successful candidates ideally possess:

- 2 years or more related experience within the retirement plan industry, which would include the following type of experience: retirement plan client relationship management, retirement plan participant education experience, related corporate retirement plan experience or individual investment experience.
- Bachelor's Degree preferred
- Industry knowledge, Life, Accident and Health and Series 6/63 License required
- Computers skills are a must; expertise in Word, Excel, PowerPoint and Outlook required
- Ability to work well independently and on a team
- Incredible attention to detail and organizational skills
- Open to continuing education, college degree preferred
- Positive attitude, even in a fast paced environment
- A passion to make customers and coworkers feel important and valued
- Capability to work quickly and efficiently
- Methodical, yet swift decision making skills
- Precise verbal and written communication skills, even under time constraints



Lawley provides equal employment opportunities (EEO) to all employees and applicants for employment without regard to race, color, religion, sex, national origin, age, disability or genetics.