

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, NYS Life, Accident and Health and Series 65/63 or 66 License required or a willingness to obtain these within 6 months of hire
- 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

What's in it for you? *The Lawley Advantage!*

- Fulfilling career securing your clients' well being
- Competitive salary, referral bonuses **AND** an annual bonus eligibility
- Great Benefits (Medical, Dental, Vision, Wellness-- the works!)
- Educational and growth opportunities
- Generous PTO and 401K upon hire
- Comfortable, family oriented culture
- Office hours 8-4:30
- Work hard, play hard!!!



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.