

# 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 and referral bonuses
- 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 age, race, creed, color, religion, sex, sexual orientation, national origin, citizenship, immigration status, gender identity or expression, military status, familial status, marital status, disability or genetics.'*