Lawley

INSURANCE | EMPLOYEE BENEFITS

Retirement Client Service Specialist

These are the *fun*damental components of the job:

- This position supports the Account Executive (s), by functioning as a liaison between the client and provider to request plan information, coordinate fund and plan design/analysis changes, and help answer participant questions
- Assist with preparation of detailed plan summaries; coordinate client presentations and plan reviews with Retirement consultant and Account Executive
- Support Account Executive (s) with coordination and preparation for employee education meetings
- Submit any necessary paperwork to providers, and assist in plan review preparation and plan review presentations
- Follow-up on requests for information, potentially grow to attend plan review meetings

Other *fun*ctions of the job:

- Expand and grow in your role when supporting miscellaneous duties as requested

Skills / traits that we value for this role:

- Insurance experience in a customer service or account management role, for 1 or more years
- College degree preferred; open to continuing education and/or willingness to learn the investment/retirement plan industry with Lawley support (FINRA Series 65/63/66 license and NYS Life, Accident and Health license)
- Computers skills are a must; Including Word, Excel, Outlook & PowerPoint.
- Ability to work well independently and on a team
- Incredible attention to detail and organizational skills
- 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
- Reliable Transportation as travel to client sites may be involved
- 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 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.'

A bit about Lawley!

- We are not a call center environment
- We achieve success by building genuine relationships together, with our teams and clients
- We are a family owned insurance broker (nearly 70 years!)
- We are deeply committed to the communities we serve and love to get involved
- We work hard and play hard!!!

Why Lawley?

- Competitive salary and referral bonuses!
- Expansive Benefits (Medical, Dental, Vision—and SO many more)
- 3 weeks of PTO (prorated based on start date) AND a generous holiday schedule – available 1st day!
- Company 401K contribution received starting Day 1 (for participants 21+ years old)
- Educational support, career development, and growth opportunities
- Job Security (we've never had a lay-off, even during the pandemic)
- Flexibility, including hybrid schedules! Business hours 8am-4:30pm
- Comfortable, family-oriented culture, with an emphasis on work life balance
- Unlimited Volunteer Time Off opportunities (so you can assist in serving our communities)
- Fulfilling opportunities that align with your career path and our business needs

The compensation range for this position takes many factors into consideration including but not limited to: years of experience/training, skill set, and licenses/designations. It is not typical for an individual to be hired near the top of the range for a position as circumstances and location can vary in every hiring situation. A reasonable estimate of the current range is $43,642.50 to $72,737.50.

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