

# Lawley

INSURANCE | EMPLOYEE BENEFITS

## Retirement Account Executive

### These are the *fundamental* components of the job:

- 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

### Other *functions* of the job:

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

### Skills / traits that we value for this role:

- 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 preferred; Life, Accident and Health and SIE (Securities Industry Essentials) preferred
- Series 63/65 OR Series 66 required (or willingness to obtain in the first 120 days)
- 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



*'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 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

### **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 1<sup>st</sup> day!
- Cell Phone Allowance
- 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 \$56,750 to \$101,279.75.

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