

# Lawley

INSURANCE | EMPLOYEE BENEFITS

## Retirement Account Executive/Team Lead

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

- This role is responsible for retirement plan design and providing clients with proactive services with existing and/or future plans with Lawley Retirement Advisors
- You will have the opportunity to identify and make recommendations that are beneficial to your clients needs during quarterly/annual process
- This position builds and maintains 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
- Coordinates and facilitates marketing and implementation of new and existing clients.
- Will conduct group employee education meeting to increase retirement plan participation and salary deferrals.
- Acts as liaison to plan providers, third party admins, attorneys and accountants
- Monitors team functions and identifies ways to improve efficiency and productivity
- Prioritizes work flow for retirement team
- Reach and maintain retention goal of 95% or greater
- Serve as an expert and mentor, actively coach and develop team members in retirement topics including but not limited to retirement offerings, clients and systems
- Be a resource for shadowing/training experiences throughout the footprint

### 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 Series 65 License preferred
- Computers skills are a must; expertise in Word, Excel, PowerPoint and Outlook required
- Ability to work well independently and on a team



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- 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

### **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!
- Call 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 \$71,706.08 to \$119,510.13.

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