

# Lawley

INSURANCE | EMPLOYEE BENEFITS

## Retirement Sales / Financial Advisor

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

- Prospect, sell and develop qualified Retirement plans to corporations and cultivate individual wealth management opportunities
- Develop and manage relationships with plan sponsors and their employees, delivering ongoing retirement plan support and guidance
- Conduct regular plan reviews, including performance analysis, fee benchmarking, and fiduciary assessments; offering strategic recommendations for improvement
- Advise on plan design, compliance challenges, and corrective strategies (including failed testing)
- Review and evaluate fund line-ups and performance against benchmarks
- Assist with client onboarding, education sessions, and finalist presentations
- Collaborate with internal teams on reporting, plan operations, and participant services
- Serve as the primary consultant for institutional clients, providing guidance on retirement plan design, investment selection, and compliance.
- Stay informed about regulatory changes and industry trends to provide proactive advice.
- Build and maintain strong relationships with clients, ensuring a high level of satisfaction and trust.

### Other *functions* of the job:

- Seek to cross sell business from existing Lawley divisions
- Expand and grow in your role when supporting miscellaneous duties as requested

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

- 5+ years of sales and business development experience
- Must possess the following licenses: Series 6 and Series 65 license OR Series 7 and Series 66 license, Life and Health License; Open to continuing education
- Experienced in conducting group and individual employee education meetings
- Bachelor's Degree preferred
- Microsoft Office experience and skills are a must; Salesforce experience preferred
- Ability to work well independently and on a team
- Incredible attention to detail and organizational skills



*'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.'*

- 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

### **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 (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)
- Unsupervised PTO AND a generous holiday schedule – available 1<sup>st</sup> 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 with networking/events after hours as needed.
- 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

Compensation for our production/sales positions are based on commissions. In some hiring situations, we may choose to invest and offer an interim base salary based upon an applicant's experiences, background, and potential book of business. If applicable, a reasonable estimate of the current base salary range is \$84,613.20 to \$141,022.00 PLUS commissions.

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