



Job Title: Brokerage Manager
Department: Brokerage Marketing Team
Reports to: **Director of Business Development**

Role objectives:

We are a national multi-line Brokerage Agency that provides dedicated support and innovative resources to those who provide financial solutions to families and businesses. Our Brokerage Team is motivated, forward-thinking individuals who develop advisor relationships and design creative product solutions with advanced marketing concepts. We work as a team and we take pride and ownership of being a trusted partner to our advisors.

Responsibilities:

- Drive sales and retention of new advisor/corporate relationships
- Develop new business with recruited advisors in a specified territory on individual insurance products; life, disability, long-term care, and annuities
- Represent AIMCOR and KAFL's portfolio of insurance products knowledgeably and effectively so that advisors can clearly identify the benefits of the products relative to its competitors.
- Case design, running illustrations, and preparing quotes and proposals for Advisors
- Prepare Advisors/clients with the necessary new business applications and forms to write a case, while following up to ensure submission of business quoted
- Share business-building ideas and strategies with Financial Advisors
- Provide technical information to advisors on advanced marketing concepts
- Provide expert perspective in client point-of-sale meetings
- Offer and coordinate client marketing programs with assigned advisors (ie: client and prospect seminars)
- Meet call activity expectations and monthly sales goals set forth by team
- Set and work towards achieving personal revenue goals to assist in the growth of the overall company
- Work closely with other business partners to align activities and plans for the given region and its advisors.
- Develop collaborative quarterly business plans



Skills:

- **Strong Organizational Skills:** Organization and persistence are valuable assets. Recognizes what needs to be done in order to achieve identified goals. Structures time and prioritizes to meet objectives. Willing and eager to learn.
- **Teamwork and Collaboration:** Contributes to the efforts of the organization as a team player. Works with KAFL Individual Sales and Employee Benefit teams to identify and capitalize on opportunities.
- **Strong Analytical Skills:** Ability to evaluate the needs of each client to determine and effectively communicate complex concepts. Comfortable with technology.
- **Strong Interpersonal and Communication Skills**
- **Prospecting Skills:** Ability to market and sourcing clients.
- **Business Acumen:** Has a sense of ownership, and drives positive results. Understands when to leverage resources and fiscal responsibility.
- **Adaptability:** Ability to adapt to a changing environment and systems. Able to prioritize and work well under pressure.

Qualifications:

- Undergraduate degree/equivalent experience required; industry designations preferred
- The candidate must be motivated with strong selling skills and the ability to drive his/her objectives relatively autonomously.
- At least 3 years of wholesaling in the life insurance, financial planning, or other related field; as well as proven success working with financials professionals to incorporate protection solutions as part of a holistic financial planning process.
- Extensive travel within Northeastern region required based on territory assigned.
- License (s): Applicable State Insurance Licenses (Required)
- FINRA Series 6 or 7 and Series 63 or 66 Preferred but not required.
- Insurance experience: 2 to 5 years in insurance sales or planning administration. An understanding of insurance products and case design. Preferred understanding of business and estate planning.



Our Core values we live by:

- **Integrity** - Doing right by our advisors and clients regardless of revenue outcomes to our organization is of the utmost importance to our team.
- **Respect** - Models respect for others while encouraging a culture of listening.
- **Accountability** - Self-motivated; We would like the candidate to commit to the activity it takes to become a successful sales and marketing professional. This will include independent learning outside of normal business hours as well as a commitment to getting the job done when high-priority opportunities present themselves.
- **Innovation** - new ideas are welcome on our team. We look to all members to bring improvement suggestions to our process and service models.
- **Collaboration** - The ability to work with a team includes the ability to develop relationships that promote open communication. The team will expect the ideal candidate to have fun, work hard and make a joint effort to grow as a unit sharing ownership in challenges and success.