



Job Title: Brokerage Manager – Advanced Case Design
Department: Brokerage Sales Team
Reports to: **Director of Sales & Marketing**
Salary Range: \$70-75K/year plus Commissions and Growth Incentive Bonus Opportunity (\$10K Level)

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. We value a positive and collaborative company culture where new ideas, innovation, and open communication are encouraged.

Responsibilities:

Manage Advanced Case Design

- Analyze client needs, research product options, and create tailored solutions to meet clients' financial goals.
- Run illustrations, and prepare quotes and proposals for Advisors
- Represent our portfolio of insurance products knowledgeably and effectively
- Provide technical information to advisors on advanced marketing concepts and case design strategies
- Offer expert perspective in client point-of-sale meetings, showcasing advanced case designs

Drive Sales and Retention of New Advisor and Corporate Relationships

- Share business-building ideas and strategies with Financial Advisors through the facilitation of book of business review meetings
- Develop new business with recruited advisors across various insurance products.
- Attend industry events, facilitate education, and recruit new advisors

Meet Call Activity expectations and monthly sales goals

- Set and work towards achieving personal revenue goals for overall company growth
- Collaborate 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 source 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.
- 2 to 5 years of insurance sales or planning administration experience; understanding of insurance products, advanced case design, business, and estate planning preferred.
- Extensive travel within the Northeastern region is required based on the territory assigned.
- License (s): Applicable State Insurance Licenses (Required)
- FINRA Series 6 or 7 and Series 63 or 66 Preferred but not required.

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.

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Brokerage Manager –
Advanced Case Design

Date