



Job Title: Internal Sales Representative
Department: Brokerage Marketing Team
Reports to: **Director of Sales and Marketing**
Salary Range: \$22-\$26/hr \$5K Corporate Growth Incentive Tier, Pooled Broker Manager Team Override

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:

Internal Sales Representative expected roles include but not limited to:

- Drive sales and retention of existing advisors/corporate relationships
- 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 and clients with the necessary new business applications and forms
- Assist with case planning composites and summary presentation spreadsheets
- Share business-building ideas and strategies with Advisors
- Provide technical information to advisors on advanced marketing concepts and assist in case design
- Offer and coordinate client marketing programs with assigned advisors (ie: client and prospect seminars)
- Establish and meet call activity expectations and monthly sales goals
- Participate in continuous training and enhance personal industry product knowledge to effectively communicate and build credibility with financial advisors/clients
- Work closely with other business partners to align activities and plans for all our territories and its advisors
- Proactive advisor outreach to follow-up on outstanding quotes, ensure application submission and education/event attendance as well as scheduling meetings for External Brokerage Managers
- Develop collaborative quarterly business plans with the external marketing team to assist them in the development of specific territories
- Utilize marketing templates to create marketing pieces and presentations for your team



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 understand and 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.
- **Learning:** Passionate about learning and has a growth mindset.

Qualifications:

- Undergraduate degree or equivalent experience required
- Candidate must be motivated with strong selling skills and the ability to drive his/her objectives relatively autonomously.
- At least 3 years of wholesaling, internal or advanced marketing experience 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.
- Limited travel within Northeastern region required. This region includes Upstate New York and Western and Central PA.
- License (s): Applicable State Insurance Licenses (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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Internal Sales Representative

Date