



## **LIFE AND ANNUITY SALES ASSOCIATE**

### **Job Description**

RMC Group is looking for a Life and Annuity Sales Associate to join our team! The primary role of the Life and Annuity Sales Associate is to plan persuasive approaches and pitches that will convince potential clients to do business with the company. They must develop a rapport with new clients, and set targets for sales and provide support that will continually improve the relationship. They are also required to grow and retain existing accounts by presenting new solutions and services to clients. The Life and Annuity Sales Associate works with mid and senior level management, marketing, and technical staff. Strategic planning is a key part of this job because it is their responsibility to develop the pipeline of new life and annuity business coming in to the company. This requires a thorough knowledge of the life and annuity market, the solutions/services RMC can provide, and of the company's competitors. They must maintain these business relationships with trust and integrity by using all means of communication: email, phone, and in-person meetings.

### **Responsibilities**

- Schedule sales appointments with prospective clients
- Maintain in-depth product knowledge and educate agents, CPAs, and other business influencers about RMC's products and services
- Generate and track new leads to continue expanding business through networking, social media, referrals, and any warm leads that may be given from RMC
- Collaborate with the marketing department to develop and implement new sales strategies
- Demonstrate advanced sales knowledge by traveling throughout designated region for various sales presentations
- Meet or exceed monthly sales goals
- Assist customers in evaluating their needs to help select the best solution
- Submit new business applications and manage the underwriting process
- Assist in the servicing of customer accounts which includes renewals and new business
- Update customer records accurately and efficiently using agency management system
- Update job knowledge by participating in educational opportunities, reading professional publications, maintaining personal networks, and participating in professional organizations

### **Qualifications**

- Passion for relationship building and selling
- Strong presentation and negotiation skills
- Confident, friendly, and outgoing personality
- Resilience, persistence, and willingness to cope with rejection
- Excellent organization and time management capabilities
- Thrive as an individual and as part of a team
- Ability to effectively communicate with colleagues and clients
- Travel required within designated state
- Life insurance license required - Property & Casualty and/or Health license preferred
- Bachelor's degree preferred, but not required
- 3+ years of life insurance sales experience with a proven track record
- Excellent PC skills including Excel, Word, Outlook, and PowerPoint

### **Location**

Designated Cities Nationwide

**Job Type**

Full-Time

**About RMC Group**

RMC is an international provider of risk management and actuarial consulting services. RMC specializes in the design and administration of innovative risk management and insurance products for the small-to-medium sized business. RMC offers a wide range of services which includes property & casualty solutions, life, health & annuity solutions, traditional insurance, insurance-based corporate finance solutions, comprehensive risk management, along with a wide variety of employee benefit plan programs and solutions. Visit [rmcgp.com](http://rmcgp.com) for more information.