



## **RETIREMENT PLAN SALES REPRESENTATIVE**

### **Job Description**

RMC Group is looking for a full-time, licensed Retirement Plan Sales Representative and Life Producer. The position is a sales consulting role responsible for all aspects of the sales process from prospecting to closing business. Responsible for seeking out new relationships with various plan sponsors, centers of influence and strategic partners. Focusing on retirement plan design for small business owners and their employees using Defined Benefit and Defined Contribution solutions funded through group annuity contracts and life insurance policies where appropriate. As a member of our team in an outside sales position, you will be responsible for driving new business sales revenue growth, as well as existing client revenue retention and growth based upon assigned book of prospects and clients. Continuing education for maintenance of your insurance licensing and/or ASPPA/NIPA credentials are provided. This position can be a hybrid or remote position depending upon the location of the candidate.

### **Responsibilities**

- Develop prospects through direct solicitation of business owners
- Develop information and recommendations for prospective accounts, present proposals and adhere to agency policies and procedures for writing new accounts
- Identify and solicit sales prospects from various sources provided by agency by cold calls, mailings and phone contacts
- Solicit referrals from existing agency accounts
- Coordinate timely presentations for new business
- Maintain knowledge of underwriting criteria for carriers represented by RMC
- Actively participates in industry associations, organizations, and/or boards and charities
- Meet or exceed monthly sales goals

### **Qualifications**

- Aggressive and assertive self-starter with strong presentation and negotiation skills
- Confident, friendly, and outgoing personality who can thrive as an individual and as part of a team
- Excellent organization and time management capabilities
- Ability to effectively communicate with colleagues and clients, both written and verbal
- Willingness to travel, as required
- Life Insurance Agent License required within three months of employment and Series 65 a plus
- CFP, QPFC, CPC, QKA, APA or other retirement plan designations preferred
- Bachelor's degree preferred, but not required
- 5+ years retirement plan industry experience and 3+ years of sales experience preferred
- Excellent PC skills including, but not limited to Microsoft Word, Excel, Outlook, and PowerPoint
- Experience with PensionPro, HubSpot and/or PlanGen preferred, but not required

### **What We Offer at RMC**

- Medical, vision, and dental insurance
- Life and short/long term disability insurance
- Paid vacation and holidays
- Flextime work schedules
- 401(k) with company match
- Career advancement and development opportunities



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### **Location**

Tucson, AZ, Bonita Springs or Naples, FL, or Remote (position to support efforts in the central and western time zones)

### **About RMC Group**

RMC is an international provider of risk management and plan administration 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.