

# Meritrust

## Wealth Management

**Job Title:** Life Insurance Sales Associate  
**Department:** Meritrust  
**Reports to:** Branch Manager  
**Level:** Full-time  
**Last updated:** 12/27/11

Fast-growing wealth management firm located in Louisville, KY has immediate opening for top-notch life insurance sales assistant. Exciting opportunity for the individual who has great customer service and organizational skills and enjoys working in a small office environment. This individual will support a successful producer, handling daily administrative duties and interacting with clients and staff.

### **Essential Functions:**

- Preparing insurance applications and client illustrations.
- Corresponding with insurance carriers.
- Creating and maintaining files.
- Calling clients to schedule appointments.
- Preparing correspondence and documents for producers and clients.
- Tracking producer compliance requirements.
- Coordinating with operations staff to thoroughly research and resolve client inquiries.
- Other duties as assigned.

### **Requirements:**

- At least five years of financial services experience with a concentration on life insurance.
- Knowledge of insurance products and processes.
- Strong analytical, organizational, multi-tasking, and follow-up skills.
- Excellent written and verbal communication skills.
- Excellent PC skills, including Microsoft Word, Excel, PowerPoint, and Outlook.
- Must be comfortable interacting with co-workers, clients, and management.

### **Preferred:**

- Life and health insurance licenses.
- Series 6 & 63 registrations.
- Knowledge of investments, trusts, bank products, and financial planning.
- Compliance experience.

### **Expectations:**

- Respect fellow team members.
- Take ownership of identified processes and responsibilities.
- Keep open communications with advisors and manager.
- Perform work with confidence and pride, follow through to completion.
- Dependable.
- Make informed decisions – discuss with manager when needed.
- Grow and learn from past mistakes.
- Work in a safe, clean, and employee friendly atmosphere.