



Retirement Plan Specialist - Sales Opportunity

Description:

Based in Cincinnati, Total Wealth Planning is a nationally recognized, fee-only firm. We provide comprehensive financial planning and investment management to a select group of business owners, executives and retirees. Providing fiduciary services to small and medium size businesses is a niche for our firm with a goal of expanding further.

Responsibilities include:

Candidate will lead new business meetings and close sales to 401k, 403b, or other institutional accounts such as cash balance pension plans, endowments and foundations. Identify and cultivate prospects and/or clients. Initiate and follow up on new business opportunities. Respond to, review and take ownership for any resultant RFP opportunities.

Consult with plan sponsors to provide fiduciary services including investment policy statement reviews, investment reviews and participant education meetings (as needed).

In conjunction with existing staff, develop a business plan and strategy to penetrate the Institutional retirement plan marketplace. Work closely with management team to discuss possibly expanding client relationships.

Candidate must have high energy and extremely motivated, have excellent verbal and written communication skills and strong interpersonal and client relationship skills.

May assist in developing and launching of new services.

Qualifications include:

Undergraduate degree in business discipline or an equivalent combination of training and experience. Master's degree or CFA Charter Holder preferred, but not required.

Demonstrated track record of success in Sales and Consultant, with a minimum of 3 years of sales experience with retirement plans and a proven ability to develop a consultative sales program ensuring long-term success.

Strong knowledge of retirement plan industry including fiduciary services and participant education as well as investments and portfolio theory.

Propensity to act as a consummate team player with the flexibility to adapt to an entrepreneurial environment.

Strong existing relationships preferred.

Note: This job description should not be construed to imply that these requirements are the exclusive standards of the position. Incumbents will follow any other instructions, and perform any other related duties, as may be required. The employer has the right to revise this job description at any time. This job description is not to be construed as a contract for employment.

Website: www.twpteam.com/jobs