Client Advisor (click this)
WealthPoint - Denver

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Summary

The primary purpose of this position is to market to profile clients and advisors, develop insurance services skills through regular contact/meetings with clients, partners and advisors and provide sales support for insurance cases.

Essential Duties and Responsibilities

Advisor Marketing:

- Schedule Advisor Meetings (as needed)
- Manage advisor relationships (create bonds with advisors, build rapport, find ways to provide value to them, make introductions between advisors)
- Schedule Social Events (as needed)
- Manage advisor marketing initiatives

Sales Support:

- Pipeline management
    - Schedule meetings (as necessary), take notes on prospects
- Provide support to move cases through the insurance process
    - Gathering documents, scheduling calls/meetings (as needed), taking applications, etc.
- Assist with reviewing and modifying client presentations
- Manage referral marketing initiatives

Administrative and Compliance:

- Support WealthPoint's internal operations by following and developing policies and procedures.
- Ensure compliance with company, industry, and Kestra Compliance, as appropriate.
- Other duties may be assigned.

Competencies

To perform the job successfully, an individual should demonstrate the following competencies:

- Business Ethics - Treats people with respect. Keeps commitments. Inspires the trust of others. Works with integrity and ethically. Upholds organizational values.
- Communications - Expresses ideas and thoughts verbally. Expresses ideas and thoughts in written form. Exhibits good listening and comprehension. Keeps others adequately informed. Selects and uses appropriate communication methods.
- Customer Service - Displays courtesy and sensitivity. Manages difficult or emotional customer situations. Meets commitments. Responds promptly to customer needs. Solicits customer feedback to improve service.
- Dependability - Responds to requests for service and assistance. Follows instructions, responds to management direction. Takes responsibility for own actions. Commits to doing the best job possible. Keeps commitments. Meets attendance and punctuality.
- Job Knowledge - Competent in required job skills and knowledge. Exhibits ability to learn and apply new skills. Keeps abreast of current developments. Requires minimal supervision. Displays understanding of how job relates to others. Uses resources effectively.
- Organization Support - Follows policies and procedures. Completes administrative tasks correctly and on time. Supports organization's goals and values.

- Planning & Organization - Prioritizes and plans work activities. Uses time efficiently. Plans for additional resources. Integrates changes smoothly. Sets goals and objectives. Works in an organized manner.
- Sales Skills - Achieves sales goals. Overcomes objections with persuasion and persistence. Initiates new contacts. Maintains customer satisfaction. Maintains records and promptly submits information.

Location
This is a full-time position in our Denver office.

To Apply
Interested candidates should submit a resume and cover letter to Shelley Forman, Director of Accounting & Finance, at shelley@wealthpoint.net

Life Insurance Underwriting

- New Business Underwriting – Manage the entire new business process from beginning to end (policy in force) including; work with producers to track and understand new business opportunities, gather medical records, complete and submit new applications, coordinate with insurance company underwriters and others, negotiate ratings, working directly with clients to communicate information, gather information, set appointments, etc.
- Administrative: Work to improve/identify opportunities for policy and procedures, compliance with company, industry and Kestra compliance regulations, as appropriate.
- Other duties may be assigned.

Solutions Analyst:
As a Solutions Analyst, a typical day would include the following:

- Create a comprehensive life insurance review for a client's policies
- Run life insurance illustrations for high net worth individuals
- Perform financial analysis to be included in a client presentation
- Develop case studies relating to various financial planning strategies

As a Solutions Analyst, you need:

- To have an analytical thought process
- Pay close attention to detail
- To have a Bachelor's degree in Business, Finance or Accounting or equivalent work experience.
- To be able to work on a team
- To be motivated
- To be highly-organized
- To be able to set and meet deadlines
- To have effective written and verbal communication skills
- To have interpersonal skills
- Have 3 – 5 years work experience in a related position (life insurance industry, case design, financial analyst)

What WealthPoint offers:

- Career-development opportunities as a part of a fast-growing company in the financial services industry
- Opportunity to learn and understand real-life applications of advanced financial planning concepts
- Great work environment and collaborative team atmosphere and culture
    - We take our work seriously, but we don't take ourselves too seriously

An ideal Solutions Analyst would:

- Be proficient in Microsoft Excel
- Have direct case design experience at an insurance firm or carrier
- Have a CLU, CFP and/or ChFC