SAPERS & WALLACK

Creative thinking, Customized solutions. Caring about you since 1932.

Sales Consultant/Business Development

Sapers & Wallack, for over 80 years a leading independent, full-service financial and insurance advisory firm, with a positive and client centered culture, is seeking to expand its staff with a sales associate. Our sales associates work to build long-term relationships with our customers, helping them navigate our full range of investment, insurance, and executive and employee benefit products and services. The primary role of the Sales Consultant/Business Development Associate is to generate new business revenue in our target markets throughout New England. Key responsibilities of this position include:

- Participate in the development of a business plan to identify annual sales objectives
- Establish both overall market and specific prospect strategies
- Learn all areas of our business to be able to uncover opportunities across areas
- Develop and execute on sales strategies to generate new business
- Ensure the highest levels of customer satisfaction
- Leverage our full holistic financial services approach to increase client base and cross sell

Requirements:

- Results-driven self-starter willing to take ownership of the job and willing to work hard to achieve success
- Individual who possesses strong values, integrity and strong work ethic
- Team player who possesses excellent interpersonal skills and face-to-face relationship building abilities, along with a high degree of self-confidence
- Demonstrated experience in communicating both written and orally with clients
- Strong track record in generating sales and a broad background in some or all of the following:
  - group benefits
  - life insurance and retirement products
  - general investments matters
  - applicable tax and estate planning issues.
- Proven and demonstrated experience in developing and deploying strategies to maintain client relationships and increase sales, along with proven prospecting and closing skills.
- A four-year college degree is preferred and relevant professional FINRA securities and Massachusetts life and health licenses are a plus

- Not required but a plus: MBA, JD, CFP, CPA, ChFC
- MA Life and Health license will be required to be completed within first 3 months of hire if not already licensed

Contact Information:

Contact Name: Stephen Schoen Email: sschoen@sapers-wallack.com

Website: http://www.sapers-wallack.com

To Apply:

Please email a cover letter and resume to Stephen Schoen.