Vice President, Benefit Planning & Administration

Sapers & Wallack, a leading independent, full-service financial and insurance advisory firm, is looking for a Manager of Benefit Planning & Administration. For over 80 years, 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 Manager of the Benefit Planning and Administration is to help grow our business through supporting sales and initiating marketing efforts to our existing clients and centers of influence in our target markets throughout New England.

Summary: The Manager of the Benefit Planning & Administration manages a department that specializes in supporting the design, funding and administration of employer sponsored nonqualified benefit plans. In addition, this individual manages all individual life product proposals, as well as procedures for monitoring existing policies for anniversary reviews and client service. In all cases the efforts – marketing and otherwise are to give first class service and create ways to do more business from our existing book.

Responsibilities:

1. Proposals for new and existing clients

- Insurance product and carrier due diligence
- Benefit plan performance analysis
- Monitor Split Dollar policies
- Assist with presentations to prospects and clients

2. Client service support

- Plan invoicing and administration fees
- Support new participant enrollment meetings
- Annual plan review
- Provide options for terminated plan participants
- Death claims
- Policy changes
- Annual policy monitoring and in force reprojections

3. Additional Responsibilities

- Understand product differences and be able to train and communicate to office and corporate clients
- Create ideas and implement marketing efforts to increase our business from existing clients and centers of influence.
- Manage BP&A team, including Director, Underwriting Advocacy
- As part of the management team also look for cross sell opportunities

Requirements:

Product knowledge

- Individual client proposals
- COLI product and underwriting
- Term policy conversions
- Replacement of existing permanent policies
- Commissions spreadsheet calculations

Bachelor degree required. In-depth knowledge of insurance products and advanced sales concepts, such as Bonus Plans, Split Dollar Plans, SERPS and Deferrals. Requires strong communication, influence and leadership abilities, excellent analytical and problem solving skills. Team player. Experience with Salesforce CRM a plus.

Contact Information:

Contact Name: Aviva Sapers Email: asapers@sapers-wallack.com
Contact Name: Ed Wallack Email: ewallack@sapers-wallack.com

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To Apply:

Please email a cover letter and resume to Aviva Sapers.