

## 401k Sales Representative

*Please note that only candidates with active Series 65, Series 6 or Series 7 license and previous experience working with retirement plans in the financial services industry will be considered for this position.*

### Are you...

- A 401k Client Manager or Financial Advisor with at least 2 years of experience working with retirement plans?
- Entrepreneurially driven and strategically minded financial services professional who thrives in the freedom of building a book of business that you have a vested ownership interest in?
- Wanting to join an industry leader that will invest in your professional development and help you reach your fullest potential?
- Ready to take a leap forward in your career with a company that truly cares about growing people - and not just profits?

If so, we want to hear from you!



**Asset Advisors of America** is a group of dedicated specialists focused solely on delivering retirement plan consulting services. Since its inception, we have become a premier independent 401(k) consulting firm, serving over 70 clients of all sizes and industries. AAA specializes in 401(k) plans and 401(k) consulting to mid to large market plans. From investment analysis and due diligence to employee communications and vendor fee benchmarking, our process-driven solutions help protect employers from corporate and personal financial liability, while increasing investment opportunities and improving overall plan value.

### Great Reasons to Work at AAA include:

- Competitive salaries and bonus earning potential
- Opportunities for professional growth and career progression

- A culture that emphasizes respect for every individual
- Company commitment to work/family life balance and community service
- Teammates who share your drive for excellence
- Knowing every day you are helping our clients achieve their financial goals

*We're looking for an experienced, licensed **401k Sales Representative** to join our **Florida** branch team.*

**401k Sales Representative success factors include:**

- Seeking out new clients and developing clientele by networking to find new customers and generate lists of prospective clients
- Being accountable for client satisfaction and delivering value to clients by broadening AAA's relationships with plan sponsors and plan participants.
- Cultivating referral relationships with internal partners, supporting client relationships based on the needs of clients and partners, and working directly with clients to assess and advise on complex financial planning topics.
- Working with internal departments to cultivate referral relationship
- Developing marketing strategies to compete with other individuals or companies who sell retirement plans
- Interacting directly with clients in delivering detailed and customized financial plans
- Participate in ongoing personal development and training to continually grow as a professional and advisor by attending meetings, seminars, and programs to learn about new products and services.
- Responsible for devising creative solutions to meet client needs as to achieving their financial goals
- Regularly exercises discretion and independent judgment on significant accounts including but not limited to:
  - negotiation of product pricing
  - interviewing clients
  - collecting and analyzing information regarding the client and assisting in product and pricing determinations
  - interpreting and implementing various company policies with regard to the specific factual circumstances of each client

**Qualified candidates will have:**

- 2+ years of sales experience and 7+ years as Account Manager or equivalent experience
- Series 65 (preferred), 6 or 7 license
- Exceptional customer service skills and outstanding verbal/written communication skills
- Ability to use experience, discretion and independent judgment to conceptualize and implement solutions to meet client needs
- Strong background in client and practice management, presentation and communication skills, and expertise in the area of financial planning.

- Exceptional personal character, including a strong work ethic, positive attitude, and willingness to assist others at all times

If you're ready to take a leap forward in your career, please click below to apply. Any candidates meeting the qualification requirements for the **401k Sales Representative** position will be contacted. We're looking forward to hearing from you!

AAA is an Equal Opportunity Employer. To learn more, please visit us at [www.ruggiewealth.com](http://www.ruggiewealth.com) and [www.ioausa.com](http://www.ioausa.com).