Balance Investments LLC is a full-service investment management and financial planning firm providing investment advice, investment management and life insurance protection to individuals, families and businesses. Our clients are everyday people, with specific financial goals and the desire to provide for themselves and their loved ones. Established in 2014, our firm is dedicated to working for our clients to help them successfully achieve their financial goals.

The Insurance Advisor Role

The primary role of the Insurance Advisor is to generate new business by helping existing clients and prospective clients meet their life insurance and annuity needs. The responsibilities for the role will involve assessing if current clients and prospective clients have insurance protection in place and selling insurance solutions where appropriate. If you enjoy helping people protect their families and loved ones and seek to earn a great income with an opportunity to grow with a growing firm, we urge you to apply for a job with our company as an Insurance Advisor. We're looking nationwide for bright, talented, sales-minded professionals with a passion for the insurance and financial service industry that want to work for an energetic and expanding company. We're a unique firm with a unique client approach and a growing roster of customers. Join us.

Insurance Advisor Responsibilities

- Develop positive working relationships with current clients and prospective clients
- Approach prospective clients about their current insurance situation and future needs and set meetings
- Explain the differences in insurance policy features so clients can make informed decisions about their purchases and effectively sell through to close
- Follow up with clients after initial meetings and conversations
- Assist when necessary with obtaining underwriting approval
- Deliver policy paperwork to new clients
- Identify investment cross-sell opportunities and recommend prospective clients to Investment Advisor where appropriate
- Conduct annual policy reviews with clients
- Effectively generate referrals from clients and prospective clients
- Respond appropriately and effectively to address client questions and concerns
- Participate in insurance and sales Continuing Ed programs and maintain good standing of licensure

Insurance Advisor Qualifications and Skills

- Strong organizational, written and verbal communication skills
- Strong desire to succeed and help clients
- Must be ethical, self-motivated, hard-working and coachable
- Pleasant phone manner with ability to set appointments and sell over the phone
- Life Insurance license or be willing to obtain one
- Clean background required

Compensation

- Insurance Advisor (Full Time): $90,000+ (first year)
- Associate Insurance Advisor (Flex/ Part Time): $30,000 - $60,000

For more information, visit our website at www.balance-investments.com or call (980) 949-1949.