

THE COMPANY

Barry, Evans, Josephs & Snipes (BEJS) has provided life insurance and related financial services to high net worth individuals and corporations since 1984. As life insurance specialists for more than 30 years, the firm is committed to helping clients preserve and protect their most important priorities – their families, their businesses, and the charities that help make their community a better place.

Barry, Evans, Josephs & Snipes was founded on the belief that an independent client-focused firm is best suited to design, deliver, and provide service for complex insurance portfolios. Today, BEJS is owned by four principals with over 100 years of combined experience in the industry. The firm is Carolinas-based and manages a life insurance portfolio of over \$5B on behalf of its clients. A team of 18 dedicated professionals is evidence of the firm's long-term commitment to serving the interests of its clients.

In 1987, BEJS joined **M Financial Group**, a premier financial services distribution company, serving affluent individuals, corporate executives, entrepreneurs and companies through an exclusive network of 140 independent financial services firms. M Member Firms have the best of both worlds – access to the resources of a large organization and the independence to offer customized solutions to meet our clients' objectives.

THE POSITION – LIFE INSURANCE MARKETER

Responsibilities

The primary focus of the position is to introduce and implement insurance-based solutions to assist affluent individuals and successful companies address financial concerns. To be successful, he/she will need the ability to identify and gain access to families and businesses that can benefit from the resources of the firm, engage them in dialog to uncover their priorities and challenges, and then, working with the BEJS team, help create and implement solutions to those challenges.

Our goal is to create relationships in which we are among the most trusted client advisors. Successful candidates will have a demonstrated ability to cultivate long-term client relationships and embrace a collaborative culture that places a high premium on teamwork and complete transparency.

Specific responsibilities will include the need to successfully execute the following on a routine and consistent basis:

- Identify and engage financially successful individuals, families, business owners, and/or corporations that could benefit from the unique resources of BEJS.
- Identify and understand challenges and issues faced by these prospects that can be addressed via insurance-based solutions.

- Collaborate with the BEJS team to develop and refine solutions for identified opportunities.
- Communicate these solutions to prospects to help them understand how and why they work, often requiring simplification of complex ideas.
- Manage prospects and existing clients through the various stages of implementation including design, underwriting, and the transition to client services.
- Collaborate with the client service team to maintain the client relationship and identify new opportunities through established service processes.
- Effectively manage networking, marketing, and sales activity.
- Working with the principals of the firm, promote BEJS within the advisor and business community, with both existing relationships and in the development of new relationships.
- Develop and maintain knowledge of the utility and applications of various life, disability, and long term care products.
- Develop and maintain knowledge and expertise of accounting, legal and tax issues and their impact on existing and future business and participate in industry meetings to maintain contemporary knowledge of current trends.

THE CANDIDATE

Education/Certifications

- Undergraduate degree is required.
- Appropriate licenses: Life and Health Insurance and FINRA (Series 6 and 63)
- Pursuit of a professional designation is encouraged. Acceptable designations include CLU, ChFC or CFP.

Professional/Personal Qualifications

To perform the role successfully, an individual should possess and be able to demonstrate the following competencies:

- High degree of ethics and sensitivity to maintaining confidentiality of prospects' and clients' information as well as BEJS's proprietary work product and data.
- Fits the values and culture of Barry, Evans, Josephs & Snipes, and enjoys collaborating with a dedicated team of professionals.
- Enjoys working in a professional, entrepreneurial culture with minimal bureaucracy and high levels of collaboration.

- Client-centric person who is able to understand client needs and work with the resources of the company to implement creative solutions to maximize growth.
- Strong marketing, sales, and negotiation skills that demonstrate leadership, commanding presence, and persuasive ability.
- Excellent communications skills, written and verbal, both internally and externally. Effective in a variety of presentation settings: one-on-one, small, and large groups. Congenial, yet highly professional in style and demeanor.
- Exceptionally bright, creative individual with solid business acumen related to client relationship management and business development process

Additional consideration will be given to candidates who can demonstrate the following experiences and aptitudes:

- Significant experience in sales and marketing, including a proven history of sales in the financial industry and the acquisition of new clients.
- Experience in Estate Planning, Wealth Transfer, Executive Benefits, and/or other insurance plans acquired by affluent individuals, families, business owners, and corporations.
- Proven ability to originate, develop, and manage relationships with advisors, centers of influence and key decision makers for high net worth individuals
- Knowledge of applicable tax, legal, and regulatory environment.

CONFIDENTIAL CONTACT

Clint J. Crocker, CFP Partner

1100 Kenilworth Ave Suite 110
Charlotte, North Carolina 28204

Clint.crocker@bejs.com

(704) 333-0508