



The Next Generation of Insurance Brokerage™

Relationship Manager / Brokerage Director

ABOUT US

Provada is the culmination of over 140 years of experience in the life insurance industry. During that time, we have learned what it takes to succeed as a financial professional. And we have learned what financial professionals need from a brokerage firm to assist them in reaching their highest potential.

Provada has been designed first and foremost with the needs of our clients in mind. These clients include insurance agents, financial planners, CPAs, and other financial professionals who need access to a wide range of life insurance products delivered with premier service. We work directly with advisors in addition to having special arrangements with insurance agencies, independent broker-dealers, and other financial firms.

We are creating the industry's first comprehensive marketing and outsourcing solution, Agency Process Outsourcing™ - a business model that will give us a sustainable and significant competitive advantage for many years to come. The key to proper execution of this model is the **Provada** team members. We are looking for an exceptional person to join our team and make a major contribution to our success.

ABOUT THE POSITION

As a Relationship Manager / Brokerage Director, you will have the regional responsibility of recruiting new producers and driving sales. You are a critical part of our Sales team and are responsible for all relationship management activities with Provada clients.

ESSENTIAL DUTIES AND RESPONSIBILITIES

- Recruit new producers
- Maintain a database of contacts
- Maintain relationship management responsibilities to ensure that our clients and their staff are satisfied with the products and service they are obtaining from **Provada**
- Engage in other related sales activities including client meetings, phone calls, seminars, trade shows, etc.
- Work internally with other **Provada** team members to effectively issue and place policies, including acting as the liaison between agents and underwriting
- Produce sales illustrations and proposals
- Plan meetings including travel reservations, meeting space, etc.
- Track monthly production
- Help resolve any commission issues or other problems

QUALIFICATIONS AND REQUIREMENTS

- Exceptional written and oral communication skills
- Experience in a sales role
- Life insurance license preferred (required within the first 90 days of employment)
- Ability to multi-task in a fast-paced sales oriented environment
- Demonstrated history of successful relationship management
- Bachelors Degree preferred but not required



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WORK ENVIRONMENT

Provada is located in downtown San Francisco in a modern, high rise office building. There is building security on site 24 hours a day, 365 days a year. We are two blocks away from MUNI and BART. Your geographic location and area of responsibility may require you to work from your own home and travel extensively.

Our office is fast-paced, but at the same time a low-key, friendly place to work. As a Brokerage Director, you will have all of the tools necessary to do an exceptional job.

SALARY AND BENEFITS

- Salary is commensurate with background and experience. We believe in paying people according to the value they bring to the organization. All team members participate in the financial success of the company. Brokerage Directors derive a substantial portion of their compensation from commissions and incentives.
- We offer a full-range of benefits including medical insurance, dental insurance, long-term disability insurance, life insurance, a flexible spending account, a 401(k) plan, and other incentives and opportunities one would expect from a company looking to hire the best.