



Internal Wholesaler

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 Next Generation of Insurance Brokerage™ - 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 an Internal Wholesaler, you will work in partnership with **Provada** team members to develop and maintain existing relationships, as well as identify and acquire new business. You will play a key role in Provada's expansion and have an opportunity to take on additional responsibilities as you gain experience and knowledge.

ESSENTIAL DUTIES AND RESPONSIBILITIES

- Provide internal wholesaling support to our outside sales team
- Complete sales planning in conjunction with our outside sales team and company management
- Provide sales support and systematic follow-up activities to our clients
- Use multiple software systems and tools to support sales activity including insurance company illustration systems, third-party applications, and proprietary tools and methodology.
- Work with our marketing professionals to create and implement programs to ensure sales goals are met
- Bring new clients to **Provada**
- Ensure sales goals are achieved by maintaining the velocity of sales activity (filling the pipeline)
- Build a strong partnership with members of the outside sales team
- Proactively and systematically maintain in contact with our clients through outbound calls and marketing campaigns
- Meet with clients in-person as required
- Follow-up with leads developed from trade shows, referrals, and other marketing campaigns

QUALIFICATIONS AND REQUIREMENTS

- Bachelors Degree or equivalent work experience
- Effective team player with exceptional organizational and communication skills (both written and oral)
- An innate ability and desire to build strong relationships
- Strong sales skills including assertiveness and confidence
- Strong project management and organizational skills
- Ability to set priorities and meet deadlines
- Manage a variety of responsibilities with constantly changing priorities
- High level of customer service
- Extensive PC knowledge (Word, PowerPoint, Excel, and Outlook)
- Willing to travel occasionally



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.

Our office is fast-paced, but at the same time a low-key, friendly place to work. As an Internal Wholesaler, 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.
- We offer a full-range of benefits including medical insurance, dental insurance, long-term disability insurance, life insurance, a 401(k) plan, and other incentives and opportunities one would expect from a company looking to hire the best.