

GOLSAN SCRUGGS

ACCOUNT EXECUTIVE

Position: Account Executive (corporate insurance agent). State licensing process to become a corporate insurance agent completed during first year.

Reports To: Director of GSRIA

General Job Description: Spread the word on insuring various types of Investment companies against claims of client and investor lawsuits to the Registered Investment Advisory (RIA) community throughout the U.S., ask for the opportunity to provide greater information, schedule a dialogue discussion, perform coverage analysis, and place appropriate insurance products for Investment company exposure.

Essential Functions: Telemarketing & Prospect Communication

- Seek out new clients by telephone
- Email correspondence with business appropriate writing
- Set telephone appointments on company calendar
- Use prospect software system
- Perform RIASURE coverage analysis and present to prospective customer by telephone
- Place appropriate insurance products for Investment company exposure

Supervision: General supervision: routine duties are performed with minimal supervision; standard practices or procedures allow me to proceed alone at routine work; occasional work is checked while in progress; work is reviewed upon completion. Formal mentorship program is established. Meetings set are performed on a team basis until the BDO has obtained appropriate degree of independent skills.

Other Duties and Responsibilities: Participate in proactive team efforts to achieve departmental and company goals.

Knowledge Requirements: Not required – but personal interest and knowledge of the investment securities world a plus to the position.

Education and Experience: Bachelor's degree (B. A.) from four-year college or university; or one to two year related experience and/or training; or equivalent combination of education and experience. Associate's (A. A.) or equivalent from two-year college or technical school; or six months to one year related experience and/or training; or equivalent combination of education and experience may be acceptable depending on candidate.

Language Skills: Ability to read and comprehend simple instructions, short correspondence, and memos. Ability to write simple correspondence. Ability to effectively present information in one-on-one and small group situations to customers, clients, and other employees of the organization.

Reasoning Ability: Ability to apply common sense understanding to carry out instructions furnished in written, oral or diagram form. Ability to deal with problems involving several concrete variables in standardized situations.

Computer Operations: Basic personal computer skills

Planning/Organization: Prioritize tasks. Must possess a personal drive to achieve personal and company goals.

Growth Opportunity: Profit sharing dependent upon productivity. Different levels of BDO graduation phases depending upon productivity.

Work Schedule/Hours: Standard 8am-5pm, Monday-Friday.

Additional Information: Position is not as much a "job" as it is a Career.