

POSITION AVAILABLE

Senior Account Executive: AE

(Los Angeles region)



Our client is one of the world's largest providers of financial services. The firm is a leading provider of investment management, retirement planning, portfolio guidance, brokerage, benefits outsourcing and many other financial products and services to more than 20 million individuals and institutions, as well as through 5,000 financial intermediary firms

Senior Account Executive has responsibility for the management, retention and development of his/her assigned client households. Each Account Executive will manage a book of approximately 400-500 client accounts, who hold retail assets of \$1mm+. The Account Executive is the lead for the client management team and insures the development and retention of these clients' accounts. The Account Executive works collaboratively with multiple business specialists to effectively create the best possible customer experience and meet the clients' broad range of investment needs.

Duties and Responsibilities

- Develop existing client relationships to retain and increase total assets, revenues and profitability
- Build a book of business, market share and share of wallet by acquiring new clients, community outreach, and referrals
- Effectively create the best possible customer experience and meet the clients' broad range of investment needs

- Understanding of the client's overall financial goals and objectives and the ability to present the broad range of HNW products and services

Qualifications

- Must have at least 6 to 8 years financial services experience
- Series 7 & 63 Securities Licenses required prior to hire
- Series 66 (63/65) and Insurance Licenses required (or to be obtained within 3 months or hire)
- In depth understanding of financial markets - solid understanding and experience with trust, estate planning, tax planning, insurance, and financial planning
- Demonstrated consultative selling skills, Investment Consultation and Financial Planning
- Ability to effectively build credibility and rapport with clients - experience with High Net Worth Clients required
- Outstanding listening and communications skills;
- The ability to close, i.e. to present solutions that are on target for customers and to motivate customers to take action.

Send Resume if interested: info@willis-consulting.com

Compensation: Salary plus bonus

Experienced. Discreet. Independent.