JOB DESCRIPTION

# LEAD ADVISOR- RETIREMENT PLANS

**FIRM OVERVIEW**

SERVE | GROW | LIVE

Three simple values that describe an outstanding culture and career opportunity. We…

- ***Serve*** our clients, our community and each other in all that we do
- ***Grow*** personally, professionally and as a firm with our client's goals top of mind
- ***Live*** a great life as part of a team with a noble purpose

*Purpose:* "…to help people live a great life."

Founded in 1979, Strategic is a Financial Times 300 Top Registered Investment and Investment News Best Places to Work. We are a dynamic, growth orientated team of 35+ professionals managing over $1.7 Billion of client assets and delivering an exceptional wealth management/retirement plan experience to Strategic's clients. Strategic has offices in Utica NY, Rome NY, Syracuse NY, and West Palm Beach FL. We plan to open an office in the Albany NY area in 2022.

**POSITION OVERVIEW**

The Lead Advisor – Retirement Plans partners with the other advisors that make up the Strategic Retirement Plans (SRP) team. The SRP team provides the Strategic Experience to our corporate retirement plan clients and pursues new business opportunities. This role has responsibility for managing existing SRP relationships by formulating, implementing, and coordinating advice/service for plan sponsors and their participants. Additionally, the Lead Advisor acts as the primary interface with all SRP third party partners.

**CORE RESPONSIBLITIES:**

- Manage existing SRP client relationships
  - Serve as main point of contact for plan sponsors and other external partners.
  - Delivery high quality touch points, analyses, and reports to plan sponsors.
  - Identify plan design opportunities and other value-added recommendations.
- Plan Participant Support
  - Support participant education/enrollment services for both groups and individuals when issues are elevated.
- Develop Ability to drive new business and progress to Senior Advisor – Retirement Plans.
  - Develop industry leading expertise in Retirement Plan advisor space including plan design knowledge, trends, credentials, and solutions.
  - Attend prospect meetings, prepare marketing and proposal materials.
  - Obtain and provide referrals for SRP and other Strategic businesses.
  - Provide valuable feedback on SRP processes, services, client experience and drive change where needed.
- Mentor Associate Advisors to help them develop into Lead Advisors.

**REQUIREMENTS:**

**TECHNICAL/EDUCATIONAL**

- 3-7 years of relevant retirement plan experience required.
- A demonstrated interest in the corporate retirement plans business, benefits, and investments.
- Strong and relevant academic credentials (bachelor's degree required).
- Additional Considerations: Designations such as C(k)P, CFP®, CFA, CEBS and advanced degrees.
- Excellent written, math and communication skills.
- High technological proficiency including Microsoft Office applications, CRM software, Project Management and Record Keeping Platforms. Salesforce experience is a plus.

**VALUES: SERVE, GROW, LIVE**

- Believes in Strategic's purpose, vision, and values
- Attention to detail, rigorous work ethic, humble attitude
- Continually exhibits personal integrity and personal initiative
- Demonstrated ability to drive growth and improve productivity
- Reliable, follows through on commitments, does not shrink from new challenges
- Organized, able to multitask and work independently when needed
- Flexible team player who is highly adaptable to change and open to innovative ideas
- Demonstrated ability to work successfully in an entrepreneurial, small company environment
- Provide references upon request
- Good person