



LION STREET®

Case Design and Product Analyst

Overview

A financial services distribution firm is searching for a Life Insurance Case Design and Product Analyst to provide internal and agent support for life insurance sales activities. Joining our experienced team of life insurance professionals, you will be responsible for providing product analysis, illustration and case design support/resources to owner-firms to drive sales through Lion Street.

Job Duties

- Work with producers and their staff on client cases in conjunction with dedicated sales teams for case design consultation.
- Maintain broad knowledge of life insurance product landscape as it pertains to available products, carrier illustration software, marketing resources, sales ideas, etc.
- Provide training, assistance and promotion to owner-firms in utilizing the product resources available through Lion Street, which includes:
 - Tracker, Lion Street's proprietary real-time pricing/customizable benchmarking system
 - Grids and guides
 - Product analytics
 - Playbook sales ideas
- Facilitate and contribute to projects related to the creation, expansion and execution of tools/resources designed to help Lion Street Owners navigate the breadth of products available in the marketplace in meeting client needs, which includes:
 - Maintaining and expanding the product playbook
 - Creating and maintaining grids and guides on specific carriers, product analytics and features
 - Contributing to and/or writing product/carrier reviews, etc.
- Responsible for proactive outreach to firms with ideas and training to help drive sales, extract market intelligence to assist in development of tools, resources and/or processes to enhance the firms' relationship and experience with Lion Street.
- Work with Lion Street carriers and alliances to leverage existing product experts and resources.
- Present and speak at various Lion Street and related meetings and calls.

Desired Skills and Experience

- 5+ years of experience in life insurance industry, case design, internal wholesaling and/or competitive intelligence preferred
- Broad knowledge of life insurance products and landscape of offerings
- Understanding of how life insurance products can be designed and utilized to meet the needs of clients in the high net worth and advanced planning marketplace
- Comfortable conducting analysis of and writing about life insurance products
- Highly responsive and proactive with field sales people
- Enjoys working with producers and their staff

- A doer looking for innovative environment where impact of efforts can be immediately seen and where few obstacles exist to being able to apply skills and talents
- Strong communication and customer service skills
- Willing to take initiative, exhibit creative thinking and take ownership of cases/projects
- Self-starter attitude and strong desire to provide excellent results
- Ability to excel in a dynamic, fast-moving company environment
- Resides in or willing to relocate to Austin, TX

Benefits

The Company Offers a Competitive Salary with Benefits, including:

- Compensation Package with Annual Bonus Structure
- Full Medical/Dental/Vision/Life/Ancillary
- Retirement Plan
- Modern Office Space in Downtown with Parking
- Employee Perks

We work to maintain the best possible environment for our employees, where people can learn and grow with the company. We strive to provide a collaborative, creative environment where each person feels encouraged to contribute to our processes, decisions, planning and culture.

www.lionstreet.com

Lion Street, Inc. is a privately held financial services distribution company based in Austin, Texas. Lion Street provides elite independent financial advisors, many of which have roots in the life insurance industry, access to the financial products, intellectual capital, and specialized resources they need to meet the sophisticated financial planning needs of their high-net-worth and corporate clients. The Broker-Dealer, Lion Street Financial, LLC and RIA, Lion Street Advisors, LLC are also based in Austin, Texas. Founded in 2010, Lion Street is managed by a team of experienced industry veterans and is a portfolio company of Austin Ventures.

About the Company

For more information on Lion Street, please go to www.lionstreet.com.

NOTE: The information on this description has been designed to indicate the general nature and level of work performed by employees within this classification. It is not designed to contain or be interpreted as a comprehensive inventory of all duties, responsibilities and qualifications required of employees assigned to this job.