



# LION STREET®

## **Life Insurance Internal Wholesaler**

Lion Street is searching for a Life Insurance Internal Wholesaler 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. This role is based in Austin, TX. If applying out of state, we would offer relocation package for qualified candidates.

### **Job Description and Duties**

In this position, you will be responsible for, but not limited to:

- Supporting producers and their team members in the area of product selection, case design and illustration fulfillment in conjunction with dedicated sales teams.
- Maintaining broad knowledge of life insurance products available from Lion Street carriers and assist firms upon request in navigating this landscape as part of the sales process. Including COLI/BOLI.
- Providing training and assistance to firms in utilizing the product and sales resources available through Lion Street, which includes:
  - Tracker, Lion Street's proprietary illustration system
  - Grids and guides
  - Product analytics
  - Playbook sales ideas
- Proactively correspond with firms to share ideas and participate in team sales campaigns as assigned by management to help drive sales
- Work with Lion Street carriers and alliances to leverage existing product experts and resources.

### **Desired Skills and Experience**

Qualified candidates must meet minimum job qualifications. Ideal candidate will have at least five or more years of experience in the life insurance industry. Strong candidates will have experience in case design, internal wholesaling and/or competitive intelligence preferred. Experience in COLI/BOLI is a plus. Must have a broad knowledge of life insurance products and how they can be optimally designed to meet the needs of clients.

In addition, qualified candidates will have an intermediate level expertise in using Microsoft Excel. Understands the importance of being highly responsive and proactive with external account executives. Enjoys working with producers and their staff /office. A doer looking for innovative environment where impact of efforts can be immediately seen. Strong communication and customer service skills is necessary to succeed in this role. Willing to take initiative, exhibit creative thinking and take ownership of cases. 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](http://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.

*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.*