

Job Description for:

Account Manager, Retirement Plan Services

Please send resume / cover letter to:
jobs@gusbates.com for consideration.
Thank you!

Culture Statement

Our guiding principle is, "Don't tell me how much you know, just show me how much you care." These words still ring as true today as when we were founded in 1966. Our foundation is built on a commitment to service and a responsibility to make a meaningful impact on our clients and community alike. We strive to be a strong partner while cultivating lasting relationships.

Mission Statement

With a deep commitment to service, our mission is to guide and educate our clients in protecting their health, property, and financial well-being.

Culture Characteristics

- ◆ True team mentality and a positive demeanor
- ◆ Integrity and a commitment to doing what is right
- ◆ Client-centered & family oriented
- ◆ Continuously cultivates relationships with an emphasis on service
- ◆ Confidently shares & expands knowledge with a humble heart

Major Job Responsibilities & Duties

- ◆ Express a can-do attitude and a servant's heart to clients and coworkers daily
- ◆ Respond swiftly to inquiries and concerns from clients
- ◆ Develop & maintain good working relationships with Clients, Account Managers, Producers, and Internal Partners
- ◆ Keep up to date with current market conditions, new products, and existing product changes

Requested Skills & Qualities

- ◆ 4-year college degree or industry specific designation preferred
- ◆ Proper licensing for team preferred
- ◆ High level of computer literacy including working knowledge of Microsoft Outlook, Word, Excel, PowerPoint and Adobe
- ◆ Excellent communication and interpersonal skills required
- ◆ A results-driven approach in order to meet goals
- ◆ Strong attention to detail and accurate record keeping
- ◆ Excellent time management skills, the ability to set priorities and adapt to changing conditions and work assignments
- ◆ Eager and willing to enhance knowledge and skills

Compensation

We would love to share more on our team member benefits and compensation. Please inquire for more details.

Please Note: This job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities and activities may change at any time with or without notice.