

Insurance Industry Job Openings

Location: Bay Area

Industry: Insurance (life insurance sales)

1) Business Development & Relationship Manager for Life Insurance Sales

The candidate must have a demonstrated and proven record of successful new client development and a strong network of existing contacts and centers of influence in the San Francisco/Bay Area/Silicon Valley. This individual must possess an area of expertise relevant to high net worth client services (i.e. estate planning, tax, trust, investment management, etc).

EDUCATION & EXPERIENCE REQUIRED:

- 4 - 5 years minimum experience of individual and/or family wealth advisory.
- California Life, Health & Disability License a plus.
- Series 6 & Series 22 License preferred.
- BA required. Highly prefer graduate or professional studies. JD, MBA, CFP, CTFA, CIMA, or CFA preferred

2) Marketing/Communications Assistant

Provides marketing support, including analysis and technical writing solutions to complex planning issues, in the design and presentation of insurance solutions for the preservation and transfer of wealth, estate and business succession plans.

- Four- year college degree or experience in lieu with at least 3-4 years minimum experience in life insurance industry or related marketplace performing the kind of work required for this position.
- CA Life and Health License a plus.
- Proficient with Microsoft Office programs, with emphasis in Excel and PowerPoint.

Email resumes to brenda@thehrmatrix.com