

## **JOB DESCRIPTION**

---

Job Title: Sales Retention Specialist  
Department: Sales  
Reports To: SVP of Sales & Distribution  
Date: August 2025

### **SUMMARY**

This is a full-time Sales Retention Specialist role located in Schaumburg, IL. The Sales Retention Specialist will work with current members, to retain their business and provide tailored life insurance and annuity solutions based on individual needs. This role focuses on maintaining and improving client relationships through proactive communication and offering expert guidance on various insurance-related situations.

### **ESSENTIAL DUTIES AND RESPONSIBILITIES** include the following

- Review and maintain lapse reports, required minimum distributions (RMDs), full and partial surrenders, maturities, loans and Universal Life requests.
- Proactively provide necessary guidance for existing policies to the members that are at risk of potential lapses, term conversions, or over-loaned issues.
- Initiate contact with new members within 30 days to provide touchpoints and welcome them to our services.
- Offer death claim suggestions and options for payout to beneficiaries, ensuring a smooth and supportive process.
- Source new business opportunities from leads and personal contacts, contributing to the team's growth.
- Perform any additional duties that may be assigned.

### **QUALIFICATIONS & SKILLS**

- Exhibits discretion in decision-making and interactions, trustworthy handling confidential and sensitive communication
- Demonstrates strong attention to detail and ensures accuracy in correspondence and document preparation
- Ability to manage and prioritize tasks efficiently and be flexible as the needs of the organization change
- Strong verbal and interpersonal skills.
- Proven experience in life insurance sales or a related field.
- Strong understanding of life insurance and annuity products, as well as relevant regulations.
- Community-minded approach with a focus on collaboration and professional development.

### **Education and Professional Experience**

- Life insurance license
- Bachelor's Degree or equivalent work experience preferred
- Minimum of 2 Years in the financial services industry
- Proficiency with Salesforce and Microsoft Office.

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

### **COMMUNICATION SKILLS**

Ability to read, analyze and interpret general business periodicals, professional journals, technical procedures, or governmental regulations. Ability to write reports, business correspondence, and procedure manuals. Ability to effectively present information and respond to questions from groups of managers, clients, customers, and the general public.

Requires strong computer and internet research skills, flexibility, excellent interpersonal skills, excellent written and verbal communication skills, project coordination experience, and the ability to work well with all levels of internal management, staff, members of the Society and external partnerships and vendors.

Successful candidates must possess a strong work ethic and be a self-starter who enjoys working in a small, entrepreneurial environment that is mission-driven, results-driven and community-oriented. Handle confidential information with discretion at all times.

### **PHYSICAL DEMANDS**

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- While performing the duties of this job, the employee is constantly required to sit and use hands to operate telephone, type and operate computer and mouse. The employee is frequently required to talk, hear, and bend and twist neck. The employee may occasionally lift and/or move up to 10 pounds and rarely lift and/or move up to 25 pounds. Specific vision abilities required by this job include close vision and distance vision.

### **WORK ENVIRONMENT**

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- While performing the duties of this job, the employee is in a typical office environment.
- The noise level in the work environment is usually moderate, but occasionally noisy.

Employee Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Manager Signature: \_\_\_\_\_ Date: \_\_\_\_\_