

Job Description

Advisor

Lacher & Associates | 215.723.4378 | www.lacherinsurance.com
632 East Broad Street, P.O. Box 64398, Souderton, PA 18964

JOB PURPOSE

- Represent Lacher & Associates in a way that exhibits the firm's commitment to our Core Values and Purpose
- Acquire new clients, retain existing clients, and support division initiatives

JOB OBJECTIVES

- Build and maintain a friendly yet professional relationship with clients
- Retain current clients and attract new clients by implementing our client engagement process

EDUCATIONAL REQUIREMENTS

As required by Pennsylvania law, this position will require the person to complete and pass the Property & Casualty and Life & Health licensing exams. This position will also need to complete all state continuing educational requirements. The CIC (Certified Insurance Counselor) designation must be obtained within the first five years of joining the firm.

JOB SKILLS & QUALITIES REQUIRED

- Strong communication and presentation skills
- Understand L&A core platform and deliverables
- High level of interpersonal skills and business acumen
- Strong time management and organizational skills
- Exercises timely and accurate completion of tasks
- Willing and able to be a team player
- Eager to learn and demonstrates a desire to succeed
- Able to use technology efficiently and effectively
- Comprehensive understanding of insurance, the carriers we represent and the technology we have available
- Accepts responsibility for own personal sales performance
- Ability to make well informed underwriting decisions
- Exemplifies the Lacher & Associates Client Experience Icons (Being Remarkable, a Solution Provider and Innovative)

Core Purpose

We Free People to Enjoy Life

Core Values

Honesty and Integrity

Serving Clients with Excellence

Building a Caring Community

Challenging Individuals to Grow Personally and Professionally

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SPECIFIC DUTIES

- Establish work/personal goals on an annual basis with Chief Operating Officer
- Annual client reviews
- Flexibility in helping with client activity during peak times and vacations
- Self-generated new client development
- Cross-selling
- Execute Lacher & Associates client experience and client expectations standards

CLIENT EXPERIENCE

We strive to treat our clients with fairness, respect and dignity. Our clients are the people and companies with whom we do business, as well as our fellow co-workers. To that end, team members should embody the following traits:

- Be a team player
- Take care of your work area; be a good neighbor
- Give positive feedback to team members
- Have a positive attitude
- Follow L&A Client Experience standards
- Be accountable
- Do what you say you will do
- Exceed expectations

TEAM LEADER

- This position reports to the Chief Operating Officer