Audible Wealth
YOUR FINANCIAL PLAYBOOK

Insurance Specialist

Audible Wealth Management is a leading financial advisory firm based in Silver Spring, Maryland, just outside of Washington D.C., with ambition to become a preferred career destination for talented professionals.

Our primary objective is to build prosperous lives as we assist clients in reaching their goals. We believe constructing a dynamic team will expand our ability to provide the best possible service to our clients.

We are hiring an Insurance Specialist to join our talented team to help us continue to deliver great value to new and existing clients.

Core Duties and Role Approach

We are seeking an ambitious professional to join their talented financial team in the role of Insurance Specialist. As a client-facing expert, this role will market the best Life/Health insurance services and products to benefit clients and solve household needs. The best candidate exhibits an interest in helping our business grow through value-based conversations and remarkable client experience.

Insurance Specialist Responsibilities

- Develop leads, schedule appointments, identify client needs, and market appropriate products and services.
- Take the lead on client onboarding and account setup process.
- Work alongside team members to ensure successful and long-lasting client relations. communication.
- Account management and maintenance for clients.
- Develop and implement risk strategies for client needs.
- Reply to inquiries regarding insurance, coverages, policy changes, and claims.
- Coordinate reviews to educate clients about insurance options.
- Work with the advisors to establish and meet marketing goals.
- Escalate complex or high-priority issues to teams for resolution.
- Collaborate with cross-functional teams to ensure client needs are met and exceeded.
- Conduct market research on risk products and education internal teams to best service clients.

8455 Colesville Road, Suite 900. Silver Spring, MD 20910 | Email: info@audiblewealth.com | Phone: (202) 430-5227 | www.audiblewealth.com

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Qualifications

Required Qualifications

- Bachelor's degree in business or related field.
- Prior experience as an insurance sales rep.
- Must hold **active Life/Health insurance** in home state.
- Ability to work in a team setting and independently to ensure client success.
- Proven ability to build and maintain strong relationships with clients.
- Strong organizational and time management skills to prioritize workload and manage multiple client accounts simultaneously.
- Proven track record of meeting sales goals/quotas.

Preferred Qualifications

- Graduate degree – JD, MBA.
- Series 6, 7, 63, 65, or 66 preferred.
- Outstanding verbal and written skills, and experience working with management.
- Strong knowledge of client relationship management principles and practices.
- Proficient in Adobe suite, Canva, or Figma.
- Self-motivated and detailed oriented.
- Flexibility to travel to visit clients.

Benefits

- $45k - $55k Base Salary (Negotiable - work history)
- Renewable Income and Bonus programs
- Hybrid Work Environment
- Flexible and Great Company Culture
- Enhanced Holidays / PTO
- Sick Days / Personal Leave
- Retirement Savings Plan
- Healthcare, Vision, and Dental plans
- Group Life Insurance
- Annual Corporate Retreat
- Career Development Support

How to Apply →

Interested applicants should send their resumes with a cover letter to **info@audiblewealth.com.** We will contact you if we believe your qualifications meet our needs. Thank you!

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