

## 401(k) Sales Associate

Reports To: Sales Manager  
Department: Sales  
Posting Date: August 1, 2022  
Location: Greenwood Village, CO



**Who we are?** Prosper Retirement Partners is an organization founded by two industry veterans, Mark Gutrich & Chris Money, who believe the emergence of the State-mandated retirement programs will result in record number of new 401(k) plan establishments. By leveraging the latest technology and regulatory structures to disrupt the traditional retirement plan business, our goal is to build an organization that surpasses our previous successful ventures. This is a unique opportunity to join a fast-growing company and become a foundational member of our sales team.

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### POSITION SUMMARY

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This position is responsible for driving 401(k) plan engagements among the clients of our preferred provider partners, by conducting active prospecting activities as well as collaboratively working with partner sales representatives.

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### KEY RESPONSIBILITIES

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- Demonstrate persistence to achieve monthly/quarterly sales targets, by undertaking consistent online marketing initiatives coupled with traditional telemarketing activities.
- Developing sales strategies, techniques, and tactics based on customer/partner feedback and the evolving market and regulatory environments.
- Coordinate and manage marketing campaigns designed to increase product awareness and drive requests for proposals.
- Actively engage partners' field sales representatives to identify new/existing clients interested in converting/improving their 401(k) plan.
- Consistently responding to inbound partner referrals to prepare and present comparison proposals.

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### PRIMARY ACTIVITIES

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- Initiate and manage a high volume of phone-based contacts, each week, to existing partners' clients.
- Maintain consistent levels of 401(k) plan leads to attain monthly sales targets and quarterly sales quotas.
- Assist partner sales representatives with investment comparisons/proposals to close plan engagements.
- Deliver high-quality, responsive sales support to all requests for information/proposals.
- Provide weekly activity reporting, detailing the number of prospecting and follow-up calls, proposals delivered and closes made.

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### JOB QUALIFICATIONS

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- **Minimum 2 years direct B2B sales / internal wholesaling experience.**
- Bachelor's degree or equivalent business experience.
- Excellent verbal and written presentation skills.
- Demonstrated problem solving and creative thinking.
- Proficient in use of Microsoft Office applications.

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### COMPENSATION

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Prosper Retirement offers a competitive compensation, including base salary, quarterly commissions and bi-annual bonuses. We offer standard benefit programs that include health, dental, vision and disability insurance plans, as well as a Safe Harbor 401(k) plan with employer matching.