

Vice President, Retirement Plan Services

Fragasso Financial Advisors, Inc. is a primarily fee-based financial planning and investment management firm headquartered in Pittsburgh, PA. We are passionate about creating an exceptional client experience, and we have been helping clients work towards their financial goals since 1972.

We are currently seeking the position of Vice President, Retirement Plan Services for our downtown office in Pittsburgh, PA. This role is tasked with leading the Retirement Plan Services Department and developing new business organically through referrals and prospecting as well as spearheading the client experience of this line of business.

Key responsibilities for this position include:

- Manages, coaches and directs the activities and results of the retirement plan services department and personnel.
- Grows assets under management through referrals, prospecting, and creating new business opportunities.
- Implements marketing/sales plans for the department utilizing the marketing and portfolio management departments for proposal support, client communications and investment management.
- Responsible for maintaining trustee relations for existing retirement plans and ensuring the proper resources are utilized to best serve the client relationship.
- Maintains consistent, documented communication with clients and prospective clients, including quarterly contact and annual meetings.
- Promotes and participates in firm-sponsored events.
- Documents all client interaction and firm activity within a designated CRM system.
- Systematically evaluates plan investments and design information to determine which updates are necessary prior to scheduled meetings.
- Establish relationships with the professional advisors of clients to coordinate planning and gain referrals for retirement plans.
- Works with financial advisors to coordinate opportunities for additional business growth.
- Pursues a comprehensive knowledge of world news and current events, specifically as they relate to the retirement plan industry.

We are seeking a self-motivated individual with management experience and proven success in the retirement plan services industry. To be considered for this position, you should possess the following qualifications:

- 10+ years' experience working in the retirement plan services industry, including proven experience in gaining new business.
- Bachelor's degree, preferably in finance and/or economics; master's degree desirable
- Series 6 and Series 65 certifications
- Series 7 certification desirable
- Insurance license in state of Pennsylvania
- Accredited Investment Fiduciary® (AIF®) designation desirable
- Strong familiarity with a client record management (CRM) system
- Excellent communication, leadership, and organizational skills

We offer an excellent benefit package, including medical, dental, vision, life, 401k/profit sharing and an Employee Stock Ownership Plan!

Fragasso Financial Advisors also received “Best Places to Work” awards last year by the *Pittsburgh Business Times* and *Investment News*.

Qualified candidates may send their cover letter and resume to gpond@fragassoadvisors.com

*Fragasso Financial Advisors is an Equal Opportunity Employer M/F/D/V
Investment Advice offered through Fragasso Financial Advisors, a registered investment advisor.*