Job Title - Manager, Annuity Product Specialist Team – Raymond James

Job Summary:

This role leads the annuity product specialist team and coordinate with other functional teams in an effort to provide clients with a platform of packaged product investment solutions. Requirement to acquire and maintain the product & strategy knowledge needed to appropriately inform advisors and clients on the various products and services available on the insurance solutions platform, including but not limited to domestic and offshore fixed, index, variable and structured annuities. Participate in various product related initiatives across Global Wealth Solutions including marketing, product development, and service initiatives. Represent the Raymond James platform in meetings with advisors, clients, and product partners in order to educate and share industry best practice on usage of various investment products. Extensive contact with internal (i.e., financial advisors, other team members, senior leadership, etc.) and external (i.e., product sponsors, industry peers, etc.) customers is required to identify, research, and resolve complex problems in selling or servicing products and business planning.

Essential Duties and Responsibilities:

- Demonstrates a commitment to creating an environment in which the investment solutions platform is managed in a manner consistent with the firm's core values - namely putting the interests of clients first.
- Leads the internal product support teams responsible for educating advisors and clients, and maintains a team culture focusing on balanced education and best in class advisor service.
- Assists the Director, Internal Institutional Annuity Distribution in the management of the Internal Annuity Consultant team.
- Transfers product knowledge and expertise by communicating with and educating other teams (e.g., operations and product support) in addition to direct financial advisor communication.
- Represents insurance solutions in recruiting "home office visits" and client "by invitation only" visits.
- Assists advisors in educating clients on the benefits and risks associated with complex investment products including product specific education and support on client cases.
- Performs human resource management activities, including coaching and mentoring staff; evaluating performance; identifying performance problems and approving recommendations for remedial action; as well as interviewing and selecting staff.
- Meet specific objectives related to proactively contacting financial advisors to discuss the products and services available on the Raymond James insurance solutions annuity platform; proactive efforts will also include, among other items, following up with advisors regarding portfolio reviews and client case designs, as well as advisors that have attended a Raymond James event or are new to Raymond James.
- Works closely with investment solutions product managers and research associates on analysis and recommendations related to existing insurance and annuity products.
- Performs other duties and responsibilities as assigned.

Qualifications Knowledge, Skills, and Abilities:

Knowledge of

- Advanced knowledge required to appropriately lead associates that educate financial advisors on multiple investment products within the Private Client Group.
- Packaged insurance, annuity and investment products and securities markets in general.
- Concepts, practices, and procedures of product development and management in a financial services/broker-dealer environment.
- Principles of banking and finance and securities industry operations including finance, accounting, budgeting, and cost control procedures.
- Advanced investment concepts, practices, and procedures used in the securities industry regarding applicable legislation, compliance standards, policies and procedures within assigned business area.
- Advanced operational infrastructure of firm, including how Investment Products function within the existing infrastructure.
- MS Office applications, particularly Excel.
- Morningstar Direct.

Skill in

- Organizing, managing and tracking multiple detailed tasks and assignments with frequently changing priorities in a fast-paced work environment.
- Industry knowledge, critical thinking, excellent verbal and written communication skills, collaborative spirit, and leadership by words, and more importantly, actions.
- Cultivating and maintaining effective working relationships at all levels of the organization.
- Critical thinking and problem solving with limited supervisory guidance.
- Implementing strategies and tactical plans across organizational lines.
- Gathering and compiling information and data.
- Basic database and technology concepts.
- Problem solving sufficient to effectively analyze, research and resolve inquiries and issues in a timely manner.
- Analyzing business processes and identifying process improvement opportunities.
- Operating standard office equipment and using required software application to produce correspondence, reports, electronic communication, and spreadsheets.

Ability to

- Demonstrate uncompromising adherence to ethical principles.
- Represent the company in a highly professional manner.
- Establish clear directions and priorities.
- Multi-task, work in teams, self-motivate/take initiative, innovate, work independently, adapt, accept and lead change, meet deadlines.
- Develop and maintain effective working relationships with team members, internal partners, and external parties.
- Incite enthusiasm and influence, motivate, and persuade others to achieve desired outcomes.
- Promote team cohesiveness, cooperation, and effectiveness.
- Lead others in providing a high level of customer service.

- Train, coach, mentor, and lead the work of others.
- Plan, assign, monitor, review, and evaluate the work of others and lead high performance teams.
- Consistently evaluate and lead others in acting on areas of potential improvement.
- Facilitate meetings, ensuring that all viewpoints, ideas, and problems are addressed.
- Partner with other functional areas to accomplish objectives.
- Gather information, identify linkages and trends, and apply findings to assignments.
- Balance conflicting resource and priority demands.
- Demonstrate a level of competence with well-respected industry partners.
- Organize, prioritize, and manage tasks and projects to complete work efficiently.
- Use appropriate interpersonal styles and communicate effectively and professionally, both orally and in writing, with all organizational levels to accomplish objectives and convince others to accept ideas or goals.
- Assimilate and prioritize strategies into operational guidelines.

Education/Previous Experience:

- Bachelor's Degree in finance or a related field and a minimum of six (6) years' experience in the financial services industry.
- Existing knowledge on the strategies and products offered on the insurance solutions annuity platform.

OR ~
Any equivalent combination of experience, education, and/or training.

Licenses/Certifications:

- SIE required provided that an exemption or grandfathering cannot be applied.
- Licenses/Certifications Required at Date of Hire: Series 7

Target Salary :- 81000
Number of Openings :- 1
Primary Location :- US-FL-St. Petersburg-Saint Petersburg