

## **Come grow with a company that has once again been named as a Top Work Place by the Milwaukee-Journal Sentinel.**

### **About Catholic Financial Life**

Catholic Financial Life is a financial services organization backed by more than 147 years of experience protecting Catholic families through life insurance and annuity products. We offer solid financial solutions to enhance the lives of our members. In everything that we do we put the needs of our members first – serving Main Street not Wall Street. Come grow with a company that has once again been named as a **Top Work Place** by the Milwaukee-Journal Sentinel

**Become part of a supportive community** that is committed to your personal success. We are offering a career, not a job, where you can grow with a company that supports your goals. As a Catholic Financial Life Advisor, you will take charge of your career and your income as you form meaningful, long-term relationships with clients and help them achieve their financial goals. Come work with an organization that has been named a Top Workplace by Milwaukee Journal Sentinel!

### **Unlimited Earning Potential**

We are a financially strong organization with a proven track record of success. We want to help you become successful and build a business that provides you with true financial security and independence.

**So how do we do that?**

We provide you with the tools necessary to reach your earning potential. Unlike other companies we offer you support and training and make sure you have all the help necessary to become financially successful and personally satisfied with a rewarding career.

### **From the very beginning we offer our Advisors:**

- Assistance starting your business with one-on-one support and personalized service.
- Training & Ongoing Education – Best-in-class sales training, product information, consumer trends and training on the skills used every day to build your business.
- Flexibility – A work environment that allows you control over your schedule.
- Marketing – You'll enjoy an annual marketing budget to promote your business.
- Technical Support - We provide you access to a laptop, client database and a target tracking system.
- Career Growth Opportunities - Mentorship programs and management tracks available.
- Financial Support – As a new Advisor, we'll provide you with a supplemental income to help you while you're getting started.
- Generous Financing Plan – We offer three levels of subsidy in your first two years, enhanced commission followed by performance-based commission and renewal commission. As well as, ongoing contests, conference trips and other incentives.

### **Knowledge/Skills/Competencies Required:**

- Degree from a two or four-year college or university; or three to five years of related experience and/or training. Degrees in Business, Finance, Insurance or related field preferred.
- Strong work ethic with a high level of personal integrity.
- Ability to manage own performance effectively; ability to adjust schedule in order to respond to ambiguity, obstacles and opportunities.
- Ability to organize and operate a business with a focus on marketing and customer service.
- Strong communication skills.
- Customer service and sales experience preferred.
- Knowledge of, or the ability to learn, prospecting and selling processes.
- Ability and willingness to travel to meet with clients.

### **Essential Responsibilities:**

- Develop and cultivate a client base and identify prospects using personal observation, natural market, referrals, seminars, community involvement, networking, etc.
- Use collaborative discovery method to analyze the prospect's financial information and needs to generate an appropriate recommendation.
- Maintain accurate records of your activity and production in order to achieve production requirements. Plan and prioritize daily activities.
- Involvement in the community, parish and schools to increase public awareness of our organization.
- Further your knowledge by actively participating in organization and industry training to keep current on new products, ideas and industry trends.
- Sell products that are aligned and suitable with individual client needs.
- Demonstrate outstanding customer service and support by continuing to assist current members in achieving their changing financial objectives.

**The only limitations on your career with Catholic Financial Life are the ones you place on yourself.** Work hard and enjoy unlimited rewards while receiving the continual

assistance and support you need to build a successful business. Get started today on a career you'll love that rewards you and impacts the lives of those you serve. [LINK](#)