Corporate Solutions – Regional Consultant

VisionPoint Advisory Group is a leading independent financial consultancy firm with a headquarters in Dallas, Texas and branches in Iowa, Minnesota, South Dakota, Colorado and Arizona. Our firm is dedicated to helping our clients succeed through a collaborative approach, a team-oriented work environment, and non-commission-based compensation. This unique approach provides a heightened value proposition within the financial services industry, resulting in stronger overall enterprise value.

VisionPoint Advisory Group, we offer comprehensive financial advisory and consulting services to private clients and employer-sponsored retirement plans. Our team of specialists work collaboratively to help our clients define and achieve their vision of True Wealth. Our proprietary approach brings all the necessary advice and services together under one roof, eliminating the need for clients to manage multiple financial relationships or make complex decisions on their own. Our sole purpose is to make our clients' visions a reality.

Position Summary:

We are seeking a highly organized and detail-oriented Regional Consultant to support our Corporate Solutions division in Iowa, Minnesota, and South Dakota. The Ideal candidate provides support to the Corporate Solutions team members, VisionPoint Pooled Employed Plan (PEP) plan service providers and participants. The ideal candidate has a passion for supporting executives and a commitment to providing exceptional administrative support. This position requires excellent communication skills, the ability to multitask, and the ability to prioritize tasks in a fast-paced environment.

Primary Responsibilities:

- Develop and maintain relationships with Plan Sponsors and Participants, serving as the primary point of contact for all retirement plan related needs
- Provide expert consultation and advice on retirement plan design, investment options, and plan administration to Plan Sponsors and Participants
- Be a Liaison between the record keeper and the client
- Collaborate with internal partners to ensure a seamless delivery of services
- Proactively identify and analyze opportunities to enhance clients' retirement plans and present recommendations
- Stay current on industry trends, regulations, and best practices
- Coordinate Participant education for clients
- Present investment options in committee meetings
- Attend client and prospect meetings and participate in clients periodic review processes
- Meet or exceed established sales goals and develop new business opportunities through prospecting and relationship building Manage and prioritize incoming calls and emails, responding to inquiries and directing them as appropriate

Qualifications:

- Bachelor's degree in Business, finance or related field
- Life & Health Insurance License (Or ability to obtain within 90 days)
- Completion of the ASPPA's QKA (Or ability to obtain within 90 days)
- At least 1 year of experience with Retirement Plans
- Strong understanding of the defined contribution plans required
- Strong understanding of non-qualified deferred compensation and defined benefit retirement plan markets preferred but not required
- Strong organizational skills and attention to detail
- Excellent written and verbal communication skills
- Ability to prioritize and manage multiple tasks simultaneously
- Ability to apply problem-solving skills to complete tasks

- Ability to work under tight deadlines
- Proficiency in Microsoft Office (Word, Excel, PowerPoint, and Outlook)
- Ability to work independently and as part of a team
- Strong interpersonal skills and the ability to work with people at all levels of the organization
- Capacity to respond appropriately to clients and escalate issues to management if necessary
- Discretion and confidentiality

Working Location:

- **Location:** Minnesota, South Dakota, or Iowa
- **Department:** Corporate Solutions
- **Reports to:** Jacinta Thompson