



MARKET LEADER

We are seeking a full-time Market Leader to join our team and support the expansion of our Firm. This role involves the development and management of an office in a new geographical location for the Firm. Our ideal candidate will possess an entrepreneurial spirit, a deep understanding of the retirement plan services industry, and a proven track record in sales and relationship management. This role is crucial to driving the proliferation of our conflict-free business model throughout the retirement plan services industry.

Key Responsibilities:

- **Business Development**
 - Identify and pursue new business opportunities to expand the firm's market presence in new geographic or demographic markets.
 - Develop and implement strategic plans to achieve growth targets in new markets.
 - Conduct market research and analysis to identify trends, opportunities, and competitive landscape.
 - Establish relationships with centers of influence both inside and outside the industry that support market expansion and growth objectives.
 - Develop presentations and marketing materials that highlight our innovative solutions and commitment to client success.
 - Develop and submit responses to requests for proposal from prospective clients.
 - Clearly articulate and promote the value added through Francis' unique conflict-free business model, differentiating Francis from its competitors.
 - Contribute to the client and prospective client intellectual property.
- **Relationship Management**
 - Build and maintain strong relationships with key clients, partners, and stakeholders.
 - Act as a trusted advisor to clients, understanding their needs and providing tailored financial wellness and investment consulting solutions.
 - Depending on the skill set of the Market Leader, providing investment consulting services or financial planning services to clients of the new office.
 - Ensure high levels of client satisfaction and retention through proactive client engagement and exceptional service.
 - Coordinate on-boarding activities of new clients with the Francis team.
- **Office Management**
 - Develop sales initiatives, set targets, and monitor performance against goals.
 - Develop and manage all personnel and financial objectives for the office.
 - Recruit and coordinate on-boarding activities of new employees to the office.

Qualifications:

- Bachelor's degree; MBA or advanced degree preferred.
- Minimum of 5-10 years of experience in the financial services industry, preferably with a focus on business development in the investment consulting or financial wellness fields.
- Proven track record of successfully expanding a business into new markets and achieving sales targets.
- Strong understanding of financial products, investment strategies, and financial planning.
- Excellent communication, presentation, and interpersonal skills.
- Ability to think strategically and creatively, with a client-centric approach.

This is a unique opportunity to help Francis change the industry of retirement plan advisory services as a full-time salaried coworker enjoying a generous benefit package including a sabbatical program and collaborative work environment.

Who We Are

Francis LLC is a nationally recognized and award-winning retirement plan consulting and financial education organization with offices in Brookfield, WI and Minneapolis, MN. We provide conflict-free investment consulting and participant financial wellness education and advice to qualified retirement plan sponsors and their participants. As an independent Registered Investment Advisor with no broker/dealer affiliations, Francis does not sell investment products nor receive compensation from the organizations or investment product we recommend. Francis currently consults to over \$17 billion in client assets.

Application

Send cover letter and resume to Susan Salmon, Director of Operations, at susan.salmon@francisway.com.