

<b>Job Title:</b>	Hy-Vee Account Executive	<b>FLSA:</b>	Exempt
<b>Division:</b>	Insurance	<b>Revision Date:</b>	03/27/2019

**Position Purpose:**

This position is responsible for managing all aspects of a Hy-Vee employee's relationship with Midwest Heritage banking, investment and insurance products. Responsibilities include developing, and maintaining strong relationships with Hy-Vee Store Directors and Human Resources Managers and internal partners in an effort to help new and existing Hy-Vee employees find product solutions that meet their needs and budgets.

**Essential Functions:**

**Business Development:**

- Visit Hy-Vee and Subsidiaries locations within a designated territory on a consistent rotating schedule to grow Midwest Heritage awareness and become the go to financial wellness expert.
- Use consultative based selling approach to identify life and disability needs and complete applications to enroll employees in these benefits.
- Actively refer qualified Hy-Vee auto insurance, home insurance, loan, deposit and investment leads to Midwest Heritage in house experts.
- Utilize Salesforce CRM to identify potential employee prospects and maximize overall efficiency.
- Develops key Hy-Vee relationships through active participation in store meetings, employee interactions and local community activities.
- Provides business information and strategic advice to new and existing Hy-Vee employees by identifying needs and making appropriate suggestions for available services while promoting exclusive advantages of working with Midwest Heritage.
- Plays an integral part in planning, developing, and implementing annual goals, strategies and budgets to enhance productivity, maximize income and meet profitability objectives.
- Ability to meet monthly activity, production and business goals established by all Midwest Heritage divisions.
- Create and manage an effective business plan for each Hy-Vee store and Subsidiary location.

**Customer Service, Marketing & Communication:**

- Provides friendly, efficient, and accurate assistance to Hy-Vee/Subsidiary employees.
- Provides each store with marketing materials and coordinates other marketing opportunities in Hy-Vee stores.
- Conduct annual open enrollment meetings at Hy-Vee stores to discuss the exclusive advantages of working with Midwest Heritage.
- Organize and present educational sessions for Hy-Vee employees throughout the year.

**Administrative & Miscellaneous:**

- Document and update salesforce.com on a consistent basis.
- Scrub and submit complete and legible life and disability applications on a timely manner.

- Stay current on applicable industry updates and legislation changes.

**Secondary Duties and Responsibilities:**

- Actively participates in regional and company training programs and sales calls, seminars, and other meetings.
- Performs other job-related duties and special projects as required.

**Knowledge, Skills, Abilities Required:**

- Seeing and hearing well enough to communicate with customers in person and on the telephone.
- Dexterity to handle papers and use computers.
- Employee management skills are necessary.

**Education, Experience, and Other Requirements:**

- Bachelor's degree in finance, insurance, business, marketing, or related field. Will consider combination of education/experience in a related role in lieu of education.
- Valid driver's license and reliable transportation.
- Must have an active Nationwide Multistate Licensing System (NMLS) number. NMLS number must be in good standing, maintained and all requirements adhered too. For employees new to the position the NMLS number must be obtained within 60 days.
- Must have Life, Health, Accident, and personal lines insurance licenses in all territory states or be able to attain these licenses within a time frame agreed upon by the manager.
- The Hy-Vee Relationship Manager must have residency in or near their assigned territory of Hy-Vee/Subsidiary locations and have the ability to travel frequently in the territory with up to 10% overnight for training and other business purposes.

**Reporting Relations:**

Accountable and Reports to: Account Executive

Supervisor Responsibilities: None

**Working Conditions and Physical Requirements:**

- This is a fast paced work environment normally conducted in a private location, Hy-Vee, or subsidiary retail location.
- Some duties may be completed at employee's residence as there is not a physical office provided.
- There is frequent pressure to meet deadlines and handle multiple projects at once.
- Travel within designated area, and as needed for other training and business purposes.
- Employee will be using personal vehicle.

**Travel:**

50-75%

**Equipment Used:**

Computer (PC with Microsoft Office programs), telephone, calculator, copier, fax, printer, agency management software and tools

**Other Position Requirements:**

**Contacts:** This position works with Midwest Heritage employees, customers, Hy-Vee employees, vendors and outside agents doing direct business with Midwest Heritage.

**Confidentiality:** This position has the responsibility to protect the privacy and confidentiality of customers, employees and bank/insurance/financial information at all times.

In the performance of their respective tasks and duties all employees are expected to:

- Follow all state and federal regulatory requirements and complete assigned training courses within the required timeframes.
- Perform quality work within deadlines.
- Interact professionally with other employees, customers and suppliers.
- Work effectively as a team contributor on all assignments.
- Work independently while understanding the necessity for communicating and coordinating work efforts with other employees and organizations.

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This job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee. Other duties, responsibilities and activities may change or be assigned at any time with or without notice.

Your signature indicates that you have reviewed this job description and understand all expectations. Please return a signed original to Human Resources for the employee file.

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**Employee Name (please print)**

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**Signature of Employee**

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**Date**