

Job Posting: Internal Business Development Specialist

Location: San Diego or Remote

Company: The Producers Group – Life Insurance Brokerage Agency

Job Type: Full-Time

About Us:

The Producers Group, a leading life insurance brokerage agency, is seeking a motivated and experienced **Internal Business Development Specialist** to join our dynamic team. We specialize in supporting financial professionals and agencies with advanced case design, sales support, and industry expertise. This position will play a critical role in supporting both external sales efforts and internal operations within the life insurance industry. The ideal candidate will have a deep understanding of life insurance products and strategies, thrive in a fast-paced environment, and be passionate about delivering exceptional services to our agents and partners. Company culture is customer-centric and committed to excellence.

What You'll Do:

- Create life insurance quotes and illustrations for term and permanent products
- Serve as a point of contact for advisors regarding existing insurance policies
- Ensure all service activity is compliant with firm and regulatory standards
- Manage policy service requests such as inforce illustration requests and assisting advisors and internal staff in preparing policy summaries and reports
- Provide product knowledge/product recommendations and case design support to external advisors
- Serve as a key internal contact for product positioning, underwriting niches, and sales support
- Keep up to date on product changes, carrier updates, industry regulations and trends
- Onboard new agents and initiate contracting and hierarchy set-up
- Maintain and update CRM system with client and case activity
- Communicate updates on new products, promotions, and carrier incentive programs to producers
- Review carrier marketing materials and assist in creating tailored marketing pieces for distribution
- Identify and resolve issues proactively to keep cases moving efficiently
- Represent and promote the value and capabilities of The Producers Group to our partners
- Collaborate with internal teams on projects and initiatives as needed

Qualifications & Experience:

- Minimum 3 years of experience in life insurance sales, marketing, case design, or business development (agency or carrier side)
- In-depth knowledge of life insurance products, illustrations, carrier platforms and carrier illustration software
- Ability to run, interpret, and explain carrier illustrations and case designs
- Involvement in onboarding advisor and knowledge of contracting and hierarchy processing
- Strong communication skills (written and verbal) with both internal and external customers
- Experience using CRM systems to manage client data and case activity
- Experience in creating and editing marketing content; familiarity with tools like Canva a plus
- Strong attention to detail, organizational skills, and a sense of urgency
- Proficiency in Microsoft Office Suite (Word, Excel, Outlook)
- A proactive, team-oriented approach with a "client-first" mindset


Why Join The Producers Group?

- Work with a knowledgeable, high-performing team in a supportive and collaborative environment
- Be part of a company that values efficiency, professionalism, and where your ideas and contributions are encouraged.
- Make a direct impact in helping producers grow their life insurance business

To Apply:

Please submit your resume and a brief cover letter outlining your relevant experience to careers@thepg.com

Compensation & Benefits:

 **Salary:** \$50,000-\$60,000

 **Benefits Include:**

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| • Health Insurance | • Vision Insurance |
| • Life Insurance | • 401(k) Retirement |
| • Paid Time Off | • Paid Holidays |
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