

Borislow Insurance Overview:

By way of background, [Borislow Insurance \(BI\)](#) is a nationally recognized employee benefits brokerage and consulting firm. Founded in 1982 by Jennifer Borislow, BI began with a singular mission of making a difference in the lives of clients. Our entrepreneurial spirit, combined with a passionate commitment to operating with an innovative mindset, crystallized into our four guiding core values: Create Community, Collaborate with Care, Grow with Intention, and Own Outcomes. In 2021, we entered a strategic partnership with BroadStreet Partners (Columbus, OH) and the Ontario Teachers' Pension Fund (\$250B). In doing so, we intentionally aligned with 30 independently owned and operated insurance agencies with revenues that exceed \$2B annually, supported by more than 9,100 insurance professionals across the United States and Canada. Our partnership with BroadStreet gives us the scale, succession planning, access to capital and resources of a multi-billion-dollar enterprise while retaining complete autonomy over strategic and operational matters.

Borislow Insurance is committed to providing innovative financial planning solutions to help our clients achieve their financial goals. We are seeking a Strategic Project Specialist who will also function as a Financial Advisor Assistant to join our experienced team in Methuen, Massachusetts. This dual role blends strategic project management with traditional financial advisor support tasks in a dynamic, client-focused environment.

Job Overview:

We are seeking a Strategic Project Specialist with expertise in both the finance and insurance sectors. This role is crucial within our high-volume service environment, requiring the candidate to adeptly manage projects, enhance client relationships, and drive technology integrations across these industries.

Job Description:

The Strategic Project Specialist – Financial Advisor Assistant will support our financial advisory team by managing both strategic initiatives and day-to-day operational tasks. This position is ideal for someone with significant industry experience looking to leverage their skills in a supportive environment focused on growth and client service.

Key Responsibilities:

- **Client Relationship Management:** Act as a key point of contact for clients, providing personalized service and handling inquiries with a professional and personal touch. Manage client interactions both in person and over the phone.
- **Strategic Project Management:** Support sales leader and financial advisor by leading projects that enhance client services and operational efficiency. Prepare and manage documentation for client meetings and strategic initiatives.
- **Operational Support:** Assist with daily activities including maintaining calendars, preparing correspondence, and managing new account and service paperwork.
- **Client Service and Administration:** Facilitate and resolve client service requests, applying knowledge of operational and client-service processes. Maintain administrative functions such as office supplies and mail.

- **Data Management and Technology Integration:** Utilize CRM systems and Microsoft Office to manage client data and improve service delivery. Ensure confidentiality and responsible handling of sensitive information.
- **Team Collaboration and Support:** Work independently and collaboratively within a team setting to meet shared objectives. Perform additional duties as assigned to support the team's goals.

Required Experience/Skills:

- Must possess or obtain insurance licenses within 90 days of hire.
- At least two years of experience in the financial services or insurance industry.
- Strong ability to manage multiple tasks and projects in a fast-paced environment.
- Excellent customer service skills and a strong commitment to client satisfaction.
- Proficient in Microsoft Office, especially Excel, and experienced with CRM systems.
- Demonstrated ability to work independently and within a team, exhibiting strong character and a positive attitude.

What We Offer:

- A challenging role at the intersection of project management and financial advisory services.
- Opportunities for career growth and professional development in a supportive environment.
- Competitive compensation and benefits package, fostering a balance between professional growth and personal well-being.

Submit resumes to Amy Sabato, Amy@Borislow.com