

## **National Secretary/Chief Operating Officer (COO)**

The National Secretary/Chief Operating Officer (COO) manages the day-to-day administrative and operational functions relevant to life insurance and annuities. The COO reports directly to the President/CEO and works consultatively as a member of the Corporate Board of Directors (CBD).

### **EDUCATION**

- Bachelor's degree or graduate degree in accounting, business, or finance.
- Insurance industry certifications are desirable.

### **EXPERIENCE**

- Holds a valid insurance license in the State of New Jersey and in other states where the UNA is authorized to sell insurance products is considered an added plus.
- Five-years of proven experience as COO or equivalent financial management position with preference of experience obtained in the insurance industry. Fraternal and Mutual Benefit Society experience a plus.
- Two-years of experience functioning in a management position in a life insurance and annuity company, with added consideration given to knowledge of insurance regulations.
- History showing in-depth knowledge of underwriting and reinsurance and strong track record in sales of insurance, annuities, IRAs and endowment products.
- Proficiency with automated financial insurance and accounting reporting systems.
- Proven knowledge of product design and development in the insurance industry with strong knowledge of actuary acceptable profit margin criteria for products.
- Familiarity with diverse business functions such as marketing, sales, personnel matters, finance, computer technology, etc.
- Demonstrated history with delivery and operation of innovative management and operational computer systems transferable to UNA's business environment.
- Proven record of developing risk-mitigation strategies and internal controls.
- Proven record of dealing with regulatory and government agencies bodies.
- Demonstrated skills filing legal and regulatory documents and in monitoring compliance with applicable laws and regulations.
- Proven record of understanding new issues quickly and making wise decisions.
- Proven ability to inspire confidence and create trust while building consensus and relationships among corporate board members, other executives and employee workforce.

### **RESPONSIBILITIES**

- Oversee and develop fraternal and membership benefits.
- Direct sales and marketing initiatives of the UNA.
- Provide leadership, direction, communication and coaching to Branch Secretaries and outside insurance sales team members.
- Develop business relationships with vendors and sales agents vital to the UNA's business needs.
- Collaborate with other executive officers in attracting, retaining and developing the best possible sales talent and instilling a performance-based culture built on selling and accountability.
- Collaborate with other executive officers in developing corporate strategic plans, financial

and operational risk assessments, achieving regulatory compliance and satisfying reporting requirements.

- Support implementation of sales strategy for UNA product sales by leveraging market knowledge and developing product positioning and value propositions.
- Hold sales team accountable for business results, key financial and operational metrics and achievement of quarterly financial commitments and annual quota.
- Maintain constant market and competitive knowledge in order to make appropriate strategic sales recommendations.
- Partner closely with cross-functional teams including Branch Secretaries, outside sales agents and industry partners, to drive revenue growth and deliver high quality customer services.
- Experience driving the successful adoption of sales methodologies and sales force automation tools in order to improve revenue predictability and close insurance deals while shortening sales cycles.
- Selling high value insurance and annuity products and undertaking negotiation and closing of vendor contracts and sales agreements with independent insurance sales agents.
- Establish clear value propositions via excellent communication skills in these forms: customer conversations, company and product presentations and written communications, such as email and proposals.
- Deliver quarterly business objectives and accountabilities, while devising and operating within a strategic territory/business plan.
- Collaborate at developing strategic plan along with annual long-range and short-range sales plans to satisfy adopted business strategies and to comply with regulatory requirements.
- Engage in the budget process, assemble all necessary information relative to life insurance and annuity business and strategic plan.
- Identify and report trends and make consultative recommendations for corrective actions.
- Review financial and operational reports and devise effective solutions or improvements, as necessary.
- Partner with executive officers to identify and implement computer-based technologies that drive business strategies and further compliance with regulatory requirements.
- Provide consultative recommendations on compliance with applicable laws and regulatory requirements, including by-laws and in-house policies and procedures.
- Custodian of all books, records and official documents maintained by the UNA and has charge of the official corporate seal of UNA.
- Inspire confidence in ability to work under pressure, plan personal workload effectively and delegate to subordinates.
- Show excellent communication and public speaking skills in English and Ukrainian languages.
- Willingness to work a flexible schedule and to travel as needed.
- Carry-out whatever other duties or tasks are assigned by the CBD.