

Job Title: Senior Account Executive  
Reports to: VP, Sales  
Direct Reports: None  
Job Location: Cleveland, Ohio, or Remote

### ABOUT PROFORMEX

At Proformex, we're a team of technologists and data scientists, creative professionals and spirited individuals who love solving big challenges in bold ways. We created the world's leading SaaS platform for proactively managing life insurance, annuities, and other protection assets. Our innovative platform equips financial professionals with the tools they need to provide data-driven advice through advanced analytics, customizable reporting, and industry-specific expertise. Currently managing over \$2 trillion in assets for our customers, Proformex serves leading financial institutions, banks, broker-dealers, and wealth management firms helping them create better outcomes for their clients.

### POSITION QUALIFICATION SUMMARY

We are seeking an experienced and results-driven Senior Account Executive to expand our footprint among institutional prospects. This high-impact role focuses on building relationships with financial institutions, including banks, broker-dealers, RIAs, and wealth management firms, to drive revenue growth through the sale of our cutting-edge data and technology platform. The ideal candidate is a strategic thinker with expertise in financial services, strong knowledge of annuity markets and products, exceptional communication skills, and a proven ability to deliver tailored solutions to complex challenges.

### KEY RESPONSIBILITIES

- Identify, prospect, and engage new financial institutions, banks, and broker-dealers to build sales pipeline and generate new business opportunities for Proformex
- Develop and execute a strategic sales plan to exceed revenue targets
- Build and maintain strong relationships with key decision-makers, including senior executives, wealth managers, operations, and compliance teams
- Serve as a subject-matter expert on annuities and life insurance technology trends to better position Proformex solutions
- Operate as a trusted advisor understanding client's pain points and business needs and aligning them to Proformex solutions
- Leverage advanced product features to address institutional pain points, such as advisor analytics, risk-based performance tracking, and customizable reporting
- Manage customer expectations to ensure a proper fit between customer needs and value provided by Proformex products and services.
- Collaborate closely with internal teams (marketing, product, customer success) to ensure customer is a good fit for Proformex's solution
- Represent Proformex at industry events, roundtable discussions, trade shows, and other meetings as necessary to successfully close new business
- Track and report sales activities, pipeline metrics, and forecasts using CRM tools

### REQUIREMENTS

- Experience in financial services technology (fintech/Insurtech), particularly with SaaS platforms
- Knowledge and experience working in annuity markets and products (strongly preferred)
- Knowledge of financial services industry, including asset management solutions, fixed income, and portfolio management
- Proven track record of meeting or exceeding sales targets with experience building a quality pipeline
- Demonstrated ability to navigate long sales cycles and expertise in explaining complex data solutions
- Outstanding communication, presentation, and negotiation skills
- Loves being part of a team and playing an instrumental role in that team's growth and success

### **Why Join Proformex?**

- Opportunity to play a pivotal role in the growth of the leading platform modernizing data access, reporting, and management in life insurance and annuities
- Join an ambitious team that loves creating new solutions to large challenges, while providing unparalleled support to its customers
- Access to cutting-edge technology and tools
- Collaborative, dynamic, and fun environment that prioritizes its people above all else

### **Compensation and Benefits**

The package includes a competitive base salary, commission structure, health benefits, and opportunities for growth within a rapidly expanding organization.

### **How to Apply**

Interested candidates should submit their resume and cover letter detailing their relevant experience.