

Koa Kaur

☎ (720) 555-8134 ✉ koa.kaur@example.com 💼 linkedin.com/example/koakaur 📍 Denver, CO 80206

SUMMARY

Retirement sales professional with five years of financial services experience supporting defined contribution opportunities, intermediary relationships, RFPs, RFIs, pricing, finalist presentations, and consultative sales processes. Holds **FINRA Series 6** and 63 registrations, Colorado life insurance licensing, and completed FINRA fingerprinting. Working knowledge of Taft Hartley plans, General Account, **Custom Stable Value**, **VEBA Stable Value**, and **retirement plan services** supports clear solution development for prospect needs. Coordinates regional sales leaders, investment specialists, product teams, intermediaries, and internal stakeholders across concurrent deadlines. Maintains accurate Salesforce opportunity records, pipeline updates, activity histories, and win or loss outcomes. Brings organized communication, practical negotiation, and reliable follow through that can support profitable retirement plan growth and strong intermediary service.

EXPERIENCE

Senior Retirement Sales Associate

January 2024 - Present

Redwood Retirement Partners

Denver, CO

Supports regional sales leaders across intermediary led retirement plan pursuits, managing proposal operations, pricing coordination, stable value discussions, finalist preparation, Salesforce records, and pipeline communication for business growth.

- Directed RFP workstreams through response calendars, product input, reviews, and deadline ready submissions.
- Organized **Taft Hartley** requirements and intermediary feedback for focused solution and pricing discussions.
- Coordinated **General Account**, **Custom Stable Value**, and **VEBA Stable Value** conversations with investment specialists.
- Maintained **Salesforce** stages, activity histories, next steps, and win or loss outcomes for leadership review.
- Prepared **finalist presentations**, **prospect meetings**, speakers, pricing materials, logistics, and follow up commitments.
- Balanced concurrent opportunities while translating prospect requirements into clear internal sales assignments.

Retirement Plan Sales Specialist

July 2022 - December 2023

Horizon Benefit Financial

Boulder, CO

Supported **retirement plan business** development across employer and collectively bargained prospects, connecting intermediaries, sales leaders, service teams, pricing reviews, proposal content, finalist meetings, and Salesforce activity tracking.

- Researched intermediary led prospects and shaped proposal content around service, investment, implementation, and pricing needs.
- Built pricing comparison workbooks that documented assumptions for sales leader review before prospect presentations.
- Tracked consultant questions and routed technical requests, giving intermediaries organized updates through active pursuits.
- Updated Salesforce records after prospect calls and reviews, preserving opportunity histories across a multi state pipeline.
- Assembled finalist and site visit materials, coordinated participants, and recorded follow up items through completion.
- Supported employer and collectively bargained plan pursuits with clear deadlines and organized deliverables.

Retirement Services Representative

October 2021 - June 2022

Pioneer Financial Services

Fort Collins, CO

Provided retirement plan service support while building practical knowledge of plan administration, participant needs, investment options, financial services controls, and case documentation that supported later sales responsibilities.

- Resolved plan and account questions through approved systems, accurate notes, and specialized escalation paths.
- Explained retirement plan information in clear language while following disclosure and service controls.
- Documented recurring employer and intermediary questions for team reference materials and service discussions.
- Managed concurrent service requests against deadlines during high volume periods with organized case records.
- Completed securities and retirement product training that supported progression into sales focused responsibilities.
- Recorded participant interactions accurately, giving specialists reliable context for complex account reviews.

PROJECTS

Taft Hartley Opportunity Development 📅 2024

Supported a coordinated sales initiative that organized plan requirements, intermediary feedback, pricing assumptions, and stable value product discussions for stronger prospect engagement.

Finalist Presentation Coordination 📅 2023

Built a repeatable preparation process for finalist presentations and site visits, helping sales leaders align speakers, materials, logistics, and follow up.

LEADERSHIP & AWARDS

- Volunteer Event Coordinator, Retirement Industry Young Professionals Network, 2024 to Present

- Financial Education Volunteer, Community Workshop Program, 2023 to Present
- FINRA Series 6 and Series 63 registrations earned in 2022

EDUCATION

Bachelor's Degree in Business Administration
Colorado State University GPA: 3.5
Coursework: Financial Services, Investments, Business Communication, Project Management

2021
Fort Collins, CO

CERTIFICATIONS

- FINRA Series 6 📅 2022
- FINRA Series 63 📅 2022
- Colorado Life Insurance Producer License 📅 2022
- FINRA Fingerprinting 📅 2022

TECHNICAL SKILLS

- **Retirement Plan Products:** General Account, Custom Stable Value, VEBA Stable Value
- **Salesforce Platform:** Opportunity Stages, Activity Histories, Pipeline Records
- **Proposal Development:** RFP Responses, RFI Responses, Proposal Reviews
- **Pricing Analysis:** Pricing Requests, Comparison Workbooks, Pricing Assumptions
- **Sales Engagements:** Finalist Presentations, Prospect Meetings, Site Visits
- **Retirement Plan Services:** Defined Contribution, Plan Administration, Participant Support
- **Sales Operations:** Opportunity Evaluation, Solution Development, Sales Close
- **Intermediary Management:** Consultant Relations, Advisor Questions, Sales Process Updates
- **Financial Services Controls:** Disclosure Practices, Approved Systems, Escalation Procedures
- **Pipeline Reporting:** Pipeline Progress, Opportunity Status, Win Loss Outcomes
- **Project Coordination:** Response Calendars, Internal Assignments, Deadline Tracking
- **Professional Licensing:** FINRA Series 6, FINRA Series 63, Colorado Life Insurance License

SKILLS

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|----------------------------|-------------------------|--------------------------|-----------------------|
| • Taft Hartley Plans | • RFI Management | • Intermediary Relations | • Project Management |
| • Retirement Plan Services | • Pricing Analysis | • Finalist Presentations | • Pipeline Management |
| • Financial Services Sales | • Stable Value Products | • Prospect Meetings | • Win Loss Tracking |
| • RFP Management | • Salesforce | • Negotiation | |

PROFESSIONAL AFFILIATIONS

- Retirement Industry Young Professionals Network, Volunteer Event Coordinator, 2024 to Present
- Community Workshop Program, Financial Education Volunteer, 2023 to Present

LANGUAGES

- English (Native)
- French (Intermediate)

ADDITIONAL INFORMATION

Work Status : Authorized to work in United States. No sponsorship required.

REFERENCES

AVAILABLE ON REQUEST