

▶ MISSION

Honoring lives and enriching caregivers.

▶ VISION

Provider of choice for creating meaningful experiences.

▶ CORE VALUES

COMMITMENT TO CUSTOMERS

We **treat all with care and empathy**, support our **communities**, and value our **relationships**.

QUALITY

We provide **exceptional service** and **outstanding products** that together, **deliver premium value**.

INTEGRITY & RESPECT

We **honor our commitments** and treat customers, partners, and each other with **dignity**.

COURAGE & COMPASSION

We have the **strength** to **do what is right** for our customer, the business, and one another.

EXCELLENCE IN EXECUTION

We are **accountable for our actions**, always **strive for excellence**, and **deliver positive results**.

CONTINUOUS IMPROVEMENT

We have a spirit of **learning & development** to **foster innovation** and an **on-going pursuit of excellence**.

VERTIN

POSITION PROFILE:

Preplanning Specialist

HELKE FUNERAL HOME AND CREMATION SERVICE
WAUSAU, WI

Are you a planner? Do you see value in financially preparing for the future? Can you empathize easily with others? If so, you just might have the distinctive combination of attributes we are looking for in a Preplanning Specialist.

This vital role involves assisting individuals and families with advanced funeral planning and funding. Successful Preplanning Specialists are equally as compassionate as they are driven. They listen carefully to the unique preferences and financial needs of individuals and present personal, meaningful solutions for a positive funeral planning experience. Through a friendly, knowledgeable approach, they build strong personal and business relationships within their local community.

TO APPLY:

If you are interested in this rewarding position, we want to hear from you! Please email your cover letter and complete resume to careers@vertin.com.

VERTIN HISTORY AND TODAY

From the first Vertin Company funeral conducted in 1904, providing professional, first-class funeral service has been our priority and creating meaningful experiences for families has been our passion. We have a long history of stability and financial security as a privately held funeral business. With locations spanning the Midwest, we are a diverse group of over 500 individuals inspired by a shared commitment to making a difference in people's lives.

Responsibilities and Requirements:

ESSENTIAL FUNCTIONS AND RESPONSIBILITIES

- ◆ Educate families by developing and delivering advanced planning presentations
- ◆ Become a trusted advisor within the community via group seminars, lunch and learns, and various other networking events and techniques
- ◆ Communicate and connect with individuals and families through direct mail and social media campaigns
- ◆ Meet or exceed set sales targets

EDUCATION, EXPERIENCE, CERTIFICATIONS

- ◆ High school diploma or equivalent
- ◆ Life insurance license or ability to obtain one within 30 days of hire
- ◆ Valid driver's license
- ◆ Previous sales experience preferably from an insurance, health care, financial, or estate planning background

SKILLS, QUALIFICATIONS, ABILITIES

- ◆ Strong communication and interpersonal skills
- ◆ Genuinely caring and empathetic approach
- ◆ Dedication to high moral and ethical standards
- ◆ Sales acumen
- ◆ Creative problem-solving capabilities
- ◆ Competitive mindset
- ◆ Excellent planning and organizational abilities
- ◆ Eagerness to learn and implement sales strategies
- ◆ Positive attitude
- ◆ Intermediate computer skills and familiarity with MS Office products