Erik Boerma

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Professional Profile

Successful account manager and salesman with experience in the financial services and technical recruiting industries. Recognized expertise and consistent record of results in:

- Annuity and long term care insurance sales
- Retirement plan implementation and accelerated growth through account management
- Recipient of multiple awards reflecting an outstanding record of goal achievement and leadership
- A trusted technology advisor driving productivity and efficiency within the company.

Professional Work Experience

Judge Group
January 2017 - present

Talent Acquisition Manager ***Aug. 2018***

- Responsible for growing the company by finding industry leading candidates to join Judge as recruiters, sales executives and consultants across the country.

Technical Recruiter ***Jan. 2017***

- Utilize strong industry knowledge, to include creating and executing various sourcing and recruitment strategies, providing trusted advisory / consultative approach to candidates throughout the interview process.
- Specialized in qualifying active and passive technical professionals through the use of Advanced Boolean Searches, Social Media, Job Boards, User Groups and internal Applicant Tracking Systems.
- Part of the pilot program bringing technical screening in house, improving the quality of candidates submitted to clients.
- 14 contractors on billing with a spread of $4k on a split desk model at the time of transition.

Lincoln Financial Group **Radnor, PA**
July 2010 - January 2017

Retirement Consultant ***Nov. 2013***

- Support retirement offerings nationwide: on-boarding new employer accounts and growing established client relationships.
- Help participants via education and services, such as retirement needs analysis, risk tolerance assessment, asset allocation education, and account consolidation.
- Develop solutions for employees in one on one meetings, motivating them to take positive actions that result in stronger retirement outcomes.
- Designed and lead presentations on retirement plan features and options.
- A leader within the company training colleagues in best practices.
- Set a new company record for money rolled into plans, which was 719% above goal.
- Awards:
  - 2015 Ambassador Award
  - 2014 Retirement Specialist of the Year
  - 2014 Rollover Champion
  - 2014 & 2015 Leaders Club Qualifier

Internal Wholesaler, Long Term Care ***July 2010***

- Work with financial advisors to sell Long Term Care offerings to high net worth individuals. Formulate best options for each client, and work with field force and prospects on positioning the offering and overcoming objections.
- $100 million in sales since start.
- Created a network inside and outside Lincoln Financial, designed to solve problems in quick and efficient manner.

- Responsible for development and growth of two territories that were underperforming.
- Selected by management to help start and develop a new hybrid territory, now a company-leading territory in aggregate sales.
- Mentor to employees looking to advance their careers at Lincoln.
- Took classes to improve presentation, sales, and problem solving skills.
- Consistently recognized as a leader in territory activities and sales practices.
- Awards
    - Q1 2012 Breakthrough Performance Award
    - Q3 2012 Overall Achievement Award
    - Q2 2013 Recipient of the Mentorship Award

ING **West Chester, PA**
Aug. 2007-June 2010
Internal Wholesaler, Financial Solutions ***May 2008***

- Managed the Los Angeles region, which produced $140 million in sales in 2008. Nurtured a network of over 5000 financial advisors. Territory exceeded sales goal by 50% during a time of market pullback.
- Recognized as a top-tier performer.
- Took over the San Diego territory and rebuilt the region: networked with producers and fixed relationships. Used market knowledge to reintroduce ING and its products.

Sales Associate, Variable Annuities ***Aug. 2007***

- Provided support to financial advisors with deep product knowledge, hypothetical analyses, and built and communicated strategic points for ING to win the business.

Education

Plymouth State University **Plymouth, NH** **May 2006**
B.S. Business Management

Licensure/Training

- Series 6; Series 63; Life, Health and Accident (PA)
- Chartered Retirement Planning Counselor designation
- Sequoia Internal Wholesaler
- Lean Six Sigma Yellow Belt
- Took multiple courses, primarily focusing on presentation and problem solving skills.
- Took part in the Kolb learning style inventory 4.0.

Proficient in: Salesforce, Excel, Word, PowerPoint

Interests

- **Family,** Skiing, Ice Hockey, Golf, Website Design, Cooking and Traveling