

Title: Internal Wholesaler
Department: Sales

Summary:

The Internal Wholesaler is responsible for partnering with a Regional Sales Director to drive sales and grow market share in the territory.

Responsibilities:

- Prospect, through cold calling, new business with financial advisors and centers of influence
- Partner with Regional Sales Director to implement and execute the territory marketing and sales plan
- Effectively segment and target calling efforts to develop strong relationships and generate new sales
- Determine client/prospect needs through probing questions, presenting potential solutions and asking for an appropriate action
- Maintain and grow relationships with current clients with a focus on uncovering new opportunities and cross selling
- Assist in coordinating appointments and meetings for Regional Sales Director

Qualifications:

- Bachelors degree; 1-3 years sales experience within financial services
- Series 7 & 63 preferred
- Working knowledge of the financial markets, knowledge of the fixed income markets preferred
- Excellent communication, presentation and listening skills
- Demonstrated initiative and sales ability
- Ability to work independently and collaborate in a team environment
- Strong organizational and territory management skills