

Title: Internal Wholesaler
Department: Sales

Summary:

The Internal Wholesaler is responsible for partnering with an External Wholesaler to drive sales and grow market share in the territory.

Responsibilities:

- Coordinate appointments and meetings for External Wholesaler
- Partner with External Wholesaler to implement and execute the territory marketing and sales plan
- Prospect, through cold calling, new business with intermediaries, brokers and consultants
- Effectively segment and target calling efforts to develop strong relationships and generate new sales
- Maintain relationships with current clients and focus on uncovering new opportunities
- Determine client/prospect needs through probing questions, presenting potential solutions and asking for an appropriate action

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
- Strong organizational and territory management skills