



Example of Distribution Specialist Job Description

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Our innovative and growing company is looking to fill the role of distribution specialist. Thank you in advance for taking a look at the list of responsibilities and qualifications. We look forward to reviewing your resume.

Responsibilities for distribution specialist

- Process B2B claims
- Assist with the scanning of trade documents into I-Vault (P8)
- Signature imaging
- Assist with signature verification/All GTS Support mailboxes
- Conduct Standby Audits twice a year
- Support Image Prep/Post Release team as necessary
- Providing Financial Advisors with a high level of service related to their Unit Investment Trust and Closed-end Fund Business
- Travel throughout ML Branch system to drive sales and promote UIT and CEF platforms
- Remaining current on all UIT and CEF products and industry developments
- Coordinate territory management to ensure appropriate office visits and Financial Advisor communications

Qualifications for distribution specialist

- Ability to utilize all available resources and tools to minimize corporate and client risk
- Support Asset Managers and Sponsor Firms to provide the appropriate recommendations and utilization of UIT and CEF investment solutions
- Current series 7 and 66 licenses
- 3 plus years of prior experience supporting Financial Advisors
- Proven strong presentation and communication skills

