



Example of External Wholesaler Job Description

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

Responsibilities for external wholesaler

- Educates Advisors on distribution of comprehensive, or total solutions within the consultative sales process model
- Responsible for the adoption of integrated approach through Consultative Sales Process model
- Partners with Individual Advisory Services Sales Coach team addressing Advisor skill set depth and readiness to execute within an integrated advice model
- Collaborates with Individual Advisory Services (IAS) Directors ensuring consistent messaging, and implementation of integrated solutions
- Builds and maintains close relationships with Advisory and CRC teams
- Responsible for participation in Advisory business planning and comprehensive communication in assigned Advisory territory
- Travels within territory to provide coaching and guidance to meet scorecard metrics
- Responsible for maintaining pipeline, activities through CRM
- Delivers integrated solutions strategies in conjunction with appropriate education addressing implementation resources available to the field
- Advocates and is responsible for the client experience across solutions

Qualifications for external wholesaler

- Forge strong partnerships with Divisional Sales Management to design coverage strategy within divisions and regions

financial markets insights

- Drive sales into GSAM investment products
- Conduct consistent dialogue with VA providers' internal sales desk
- Maintain detailed knowledge of dynamics of VA industry, including clients' product offerings
- Develop deep understanding of all VA clients' business goals and priorities by partnering with the GSAM Variable Annuity Key Accounts Team