



# Example of External Wholesaler Job Description

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Our growing company is looking to fill the role of external wholesaler. If you are looking for an exciting place to work, please take a look at the list of qualifications below.

## Responsibilities for external wholesaler

- Responsible for increasing integrated solution adoption, per scorecard metrics, among Advisors in assigned territory
- Provides key input and feedback towards product development and distribution
- Identifies productivity increases, best practices and shares with team to scale successes
- Corresponds with Endowments and Foundations Directors on institutional opportunities and charitable planning strategies
- Participates as keynote speaker at client seminars
- Attends client meetings with Financial Advisors to deliver expert level knowledge on solutions and the benefits of integration
- Responsible for building new and maintaining existing relationships with financial advisors in national broker dealers (BDs), regional BDs and independent BDs to increase revenue
- Collaborate with financial advisors to include annuities in financial plan for clients
- Provide competitive intelligence to sales and product management on a regular basis, reporting and managing contacts (face-to-face)
- Responsible for building new and maintaining existing relationships with financial advisors in national broker dealers (BDs), regional BDs and independent BDs to increase revenue from life insurance sales

## Qualifications for external wholesaler

- Work collaboratively with colleagues including internal wholesaler, other externals and marketing team
- Effectively execute on desired client strategy, including meeting targets and activity requirements
- Actively contribute to internal discussions around marketing and other resourcing needs by representing field experience
- Represent the VA Team at client sales meetings and at key industry conferences
- Effectively manage a large geographical territory
- Ability to deliver a broad range of value-added presentations and facilitate workshops