



Example of External Wholesaler Job Description

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Our company is looking to fill the role of external wholesaler. We appreciate you taking the time to review the list of qualifications and to apply for the position. If you don't fill all of the qualifications, you may still be considered depending on your level of experience.

Responsibilities for external wholesaler

- Collaborate with financial advisors to include life insurance in financial plan for clients
- Works closely with Managing Director to develop and execute business plans to maximize territory sales
- Demonstrates strong sales skills and keeps abreast of industry trends within the Defined Contribution marketplace
- Builds sales by identifying and building relationships with retirement-focused advisors
- Regularly conducts sales meetings with financial intermediaries to promote MFS products and services
- Sells products and services to focus firms and segmented advisors following strategy developed by Department Head, National Sales Director and Managing Director
- Partners with MFS external retail wholesalers to develop and close DCI pipeline leads
- Delivers MFS' practice management and business building resources on a regular basis
- Completes administrative duties consistently and submits appointment calendar and expense reports on a timely basis
- Identifies and coordinates the clients' training needs

Qualifications for external wholesaler

- Wholesaling, sales development or key accounts experience in the variable annuity marketplace strongly preferred
- Applicable state insurance life and health licensing is required
- Completion of applicable training for appointment by proprietary and non-proprietary solution providers
- Excellent interpersonal skills and client face-to-face relationship building skills
- The candidate must be motivated with strong territory management and selling skills, and the ability to drive to his/her objectives relatively autonomously