



Example of External Wholesaler Job Description

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Our growing company is looking for an 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

- Works closely with Managing Director to develop appropriate business plan to maximize territorial sales
- Conduct sales meetings with financial intermediaries to promote MFS portfolios within variable annuity and defined contribution products
- Builds strong sales skills and keeps abreast of industry trends through interaction with corporate team, training, continuing education requirements, and sales meetings
- Provides top quality service to accounts to ensure growth and retention of asset and clients
- Builds sales by identifying and prospecting new producers
- Coordinates sales efforts with home office sales representatives to execute territorial business plans with MFS field partners
- Attends conferences as needed and communicates information back to home office personnel
- Increases penetration in territory by optimizing and growing relationships within existing firms/institutions
- Utilizes expense budgets to set limits and maximize sales opportunities within his/her assigned territory
- Conducts sales meetings daily with financial intermediaries in branch offices to promote MFS products and services

Qualifications for external wholesaler

- Minimum two years of direct field sales or related experience required, five years preferred
- Position requires FINRA series 6 and 63 registrations or FINRA series 7 and 63 registrations (MIL) in accordance with MFS' licensing policy
- 3-5+ of experience years in Financial Services Sales that directly aligns with the specific responsibilities for this position
- Must hold life insurance licenses
- 5-10 years of related work experience in the insurance field