



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

- Visits and sells products and services to focus firms following strategy developed by Department Head, Managing Director and Sr
- Complies with all internal and external rules, policies and procedures, including distribution of approved literature to financial intermediaries
- Maintains and updates appointment meeting calendar through appropriate Client Relationship Management system, and ensures adherence of timely submission of expense reports
- External sales role calling on focused list of wirehouse firms in the Minnesota, Iowa, Western Wisconsin territory
- Commit to extensive travel within territory - (The position would be located in the Phoenix area, and includes coverage of Arizona, New Mexico, and parts of West Texas.)
- Develop and strengthen a business plan to maximize market share, assets and profitability for assigned territory
- Manage travel and entertainment budget to assigned amount
- Work with sales team to develop sales of mutual funds, deferred annuities, and immediate annuities in existing territory
- Travel approximately 50% of the time in assigned territory
- External sales role calling on focused list of wirehouse firms in the Ohio/Kentucky territory

Qualifications for external wholesaler

- Detailed understanding of the insurance industry and market, our products and those of our competitors highly desired
- Ability to effectively convey our priorities and creatively wholesale our products
- Takes initiative and good problem solver
- Work with Management and other Product areas of the Company
- Must live in assigned territory - will cover multiple states in the West Coast