



Example of Internal Wholesaler Job Description

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Our innovative and growing company is searching for experienced candidates for the position of internal wholesaler. To join our growing team, please review the list of responsibilities and qualifications.

Responsibilities for internal wholesaler

- Develop new business within the territory by calling on Financial Advisors and providing sales/marketing information, requested follow up information, maintaining contact and providing timely updates on products
- Represent the Professional Quality, Individual Choice and Responsible Innovation that Advisors expect from iShares
- Research firms to identify key decision makers & points of contact
- Utilize the various search databases in order to identify and define selling opportunities around specific market segments
- Attend sales meetings and conferences, prepare agendas and materials, and coordinate adequate follow-up
- Some Candidates need to have the ability to grow into potential managers and EWs
- May be given responsibility for monitoring the externally hired sales force
- Take inbound and make outbound phone calls
- Daily contact with RVP
- Document all proactive activity and pertinent issues in contact management system, appointments, thank you calls, monthly call campaigns - Participate actively in the development and successful execution of your territory business plan

Qualifications for internal wholesaler

- University degree or college qualification or equivalent work experience

- Prior experience working in the RIA channel and a deep knowledge of RIA platforms is preferred
- FINRA Series 7 and 66 licenses or obtain within 90 days
- Business Graduate/Commerce Graduate
- Emphasis on quality work and accountability