



## Example of Internal Wholesaler Job Description

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Our growing company is looking for an internal wholesaler. Please review the list of responsibilities and qualifications. While this is our ideal list, we will consider candidates that do not necessarily have all of the qualifications, but have sufficient experience and talent.

### Responsibilities for internal wholesaler

- Contact key sales partners as needed in order to maintain relationships
- Identify and recruit potential new advisors
- Make initial sales calls to advisors
- Exercise discretion and independent judgment in evaluating the advisor the advisor's book of business
- Set appointments for Recruiting Directors
- Some Candidates need to have the ability to grow into potential managers and EWs
- Make proactive sales calls on a daily basis with existing financial professionals to strengthen relationships and identify selling opportunities
- Investigate proactive sales opportunities through proactive efforts with External Wholesaler
- Work closely with the External Wholesaler to develop and execute an appropriate business plan to maximize territory sales
- Plans and executes active marketing campaigns within your territory

### Qualifications for internal wholesaler

- Must have, or be able to attain, life and health insurance licenses
- Advanced licensing, such as Securities Licenses series 6, 7, and 63 highly desirable
- FINRA Series 6 or 7 & 63 or 66 license required

- Bachelors Degree preferred in a business or related field
- Series 6 or 7 & 63 MANDATORY