



Example of Internal Wholesaler Job Description

Powered by www.VelvetJobs.com

Our company is growing rapidly and is hiring for an internal wholesaler. If you are looking for an exciting place to work, please take a look at the list of qualifications below.

Responsibilities for internal wholesaler

- Follow up with clients after visits providing information they need, making calls and sending emails with useful material
- Build relationships with clients and advisors and become familiar contact for them regarding any questions or information they need
- Record new profile details in IRIS
- Regular maintenance to existing contacts and maintain updated data
- Send information to clients (Fund factsheets, commentaries)
- Register all the activities in IRIS (inbound/outbound calls, emails)
- Conduct proactive telephone sales presentations to top tier clients and prospects, highlighting the GSAM products and value proposition
- Partner with Regional Directors (external wholesalers) to manage an assigned territory within the U.S. , driving sales and assets through execution of a defined territory plan and sales process
- Build strong relationships with advisors through telephone interaction (limited travel to client sites)
- Provide portfolio construction and practice management support to Financial Advisors, helping them strengthen their client relationships and grow their business

Qualifications for internal wholesaler

- A+ presentation
- Good school (big 10 or better), good GPA (3.3 or higher)

- 2-5 years of work experience, either in financial sales, finance, or any other kind of sales
- Business/Commerce Graduate
- Motivated team player with strong interpersonal, organizational and problem solving abilities