



Example of Third Party Distribution Job Description

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Our company is growing rapidly and is looking to fill the role of third party distribution. 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 third party distribution

- Answering phone calls from external / internal clients
- Inputting client information and activities into internal system
- Ordering supplies and keep inventory well-stocked
- Work alongside the Platform Solutions Group to strategically position new strategies for clients and prospects
- Review, enrich and maintain investor level trade and balance data
- Bespoke and ad-hoc reporting for internal sales and management teams
- Build and develop close working relationships with cross functional teams across the organization
- Collaborate with salespeople and managers on data research/analysis requests
- Analyze data workflow and processes to identify opportunities for improvement
- Investigate and resolve sales data inaccuracies and issues

Qualifications for third party distribution

- Proficiency and ideally fluency in European languages besides English
- Effective Sales and/or Sales Management experience
- NASD Series 6/7 registrations
- Experience working with RIA's and/or independent financial advisors
- CFP, CFA and/or CIMA designation

