



# Example of Wholesaler Job Description

Powered by [www.VelvetJobs.com](http://www.VelvetJobs.com)

Our company is searching for experienced candidates for the position of wholesaler. We appreciate you taking the time to review the list of qualifications and to apply for the position. If you don't fill all of the qualifications, you may still be considered depending on your level of experience.

## Responsibilities for wholesaler

- Ability to quickly build relationships with all levels of the firms from their producer / owners to technical case designers to service and underwriting staff
- Build relationships with distribution's home office to ensure consistent messaging by both parties and be able to work jointly on cases
- Participate in monthly sales calls with distribution's home office sales teams to discuss messaging, strategy, travel, firm activity
- Constantly think about how to identify new opportunities for increasing sales
- Participate in and contribute to call campaigns
- Develop and present webcasts on various topics for training purposes (from product to illustrations to processes)
- Shepherd cases through the underwriting process and work with underwriters to advocate on behalf of the partner firms
- Assist with product technical questions, give advice on product funding, explain moving pieces of the products
- Attend an annual Marketing meeting, which includes setting up personal meetings with the key firm contacts, and TC Life senior staff
- Attend / participate/present in 2-3 Home office seminars per year

## Qualifications for wholesaler

- Bachelor's degree in Finance or other related discipline

- Ability to apply methodical and entrepreneurial approach to large list of prospects
- Comfortable multi-tasking under time sensitive deadlines
- Desire to work in fast paced, sales oriented team environment
- Series 7 & 63 Securities licenses required