



# Example of Wholesaler Job Description

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

## Responsibilities for wholesaler

- Conduct one-on-one meetings, group presentations, client events and seminars
- Prefer relationships in Independent and/or Broker Dealer Firms
- Drive sales by developing, maintaining, and deepening relationships with new and existing financial FAs (Financial Advisors)
- Demonstrate an understanding of the product portfolio features and benefits
- This is a sales position with a competitive base salary plus attractive monthly and quarterly sales bonus
- Act as the primary contact for agents and Financial Advisor offices within the assigned distribution channel
- Provide product training, information on long term care and information regarding underwriting programs, discounts, and specific plan parameters for programs developed for the supported distribution channels
- Prepare sales illustrations and proposals
- Assist in providing appropriate marketing materials, application forms, and other materials needed to write an application
- Track submitted business through to issue and provide updates to agents and GA offices as required

## Qualifications for wholesaler

- Series 7 license OR Series 6 and 63
- Bachelor's degree and 3-5 years of relevant sales/marketing experience with an investment management organization or other financial services firm

- Series 6 and 63 licenses OR ability to acquire in 6 months from date of employment
- Ability to travel 50-60% of the time to clients
- Minimum 10 years of experience working with high-end life insurance producers