



Example of Wholesaler Job Description

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Our growing company is looking to fill the role of 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 wholesaler

- Identify and develop productive relationships with distribution partners' field sales force
- Educate, train and partner with Columbia retail wholesalers on retirement related initiatives
- Develop and maintain a database of DC intermediaries' opportunities and prospective clients
- Sell/market investment-only solutions and provide value added programs to our valued partners, clients and prospects
- Coordinates with wholesaler on sales ideas, sales activities and minor administrative tasks
- Identify and convert prospects into producing financial professionals
- Coordinate with marketing and relationship management to offer key partner material on MSIM strategies
- Offer unique ideas on what materials would be helpful for partner firms/financial advisors to have so they can offer MSIM strategies to their clients and prospects
- Follow up on Business Plan achievement
- Keep track of the visits and activities in the External Wholesaler's Business Plan

Qualifications for wholesaler

- Minimum 10+ years of experience selling and/or wholesaling Life Insurance and working with high-end life insurance producers
- Ability and experience in both sales and distribution
- Some candidates should have leadership qualities
- Supervise the Accounting operations including
- Report directly to headquarters in Europe