



# Example of Wholesaler Job Description

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

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

- Work closely with the UK Marketing Team to develop a segmented digital sales strategy (email, conference calls, webinars, e-bulletins, blogs etc) in conjunction with the Client Insights team
- Engage in Social Media Activities
- Identify potential new business leads and work with others in Internal or External Sales on strategies to generate new gross sales
- Using both internal and third party systems extract fund performance, and other portfolio characteristic data items to support client requests as required
- Maintain and improve the CRM system, working towards being an expert user, to ensure all of our digital interactions are captured correctly and accounts and contacts listed are accurate
- Develop an excellent level of understanding of the company, key FTI funds and products
- As part of a total relationship strategy work in partnership with the Sales team to respond to non-investment ad-hoc enquiries from clients and have the ability to answer investment related questions for multiple funds and fund umbrellas
- Regular Reporting - provide fund information to clients on a monthly and quarterly basis
- Research, document and be able to analyse FT fund performance and attribution analysis, having a good base knowledge of key competitor funds, providing the UK Sales team with fund insights to help the overall team to meet sales targets

## Qualifications for wholesaler

- Previous experience with financial services software (Morningstar, PSN, Zephyr, Coates, FI 360) a plus
- Take charge of closing and reporting in JGAAP
- Cooperate with external audits
- Oversee internal controls across Finance
- Head cash management and cash flow control
- Management skills and experience as an accounting manager