



Example of Wholesaler Job Description

Powered by www.VelvetJobs.com

Our company is searching for experienced candidates for the position 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

- Client asset retention, through proactive client service support, across the team is an important aspect of the responsibilities
- Provide cover for others in the UK Retail Sales Team when they are out of the office, responding to enquiries on funds and products primarily via email and the telephone
- Maintain a working knowledge
- Partner with an outside Sales Consultant and internal Sales Support to maximize Wealth and Term Life insurance sales to brokerage clients
- Participate in the setting/achieving sales targets of an annual business plan with RBCI's Wealth and Term Life products
- Initiate and respond to calls to/from identified MGA and producer partners and provide marketing and service support as required for Wealth and Term Life products
- Provide product knowledge/presentations and system training to key distribution partners as needed
- Assists in new Producer/MGA set-up including proactive calling (50 per week) and follow-up material
- Conduct proactive sales presentations to top and 2nd tier producers, VA and 401(k) internal platform partners, and third party administrators highlighting FT Funds and Value-Adds
- Create and tailor sales ideas and presentations to producers and platform partners based upon their profiles and platform partner fund menu's and

Qualifications for wholesaler

- Knowledge of IFRS and JGAAP
- Communication skills both internally and with external entities
- The candidate must be motivated and energetic individual with strong project management and selling skills, and the ability to drive to his/her objectives relatively autonomously
- The candidate should have 5-7 years experience in the Investments industry, and 3-5 years of wholesaling experience
- The candidate will be required to travel extensively in the field, approximately 90% of the time
- License to obtain Series 7, 66