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Job Title: Internal Wholesaler

Job brief

Provide external wholesaling of all products for Financial Advisors in assigned accounts. Drives life insurance product sales by earning the confidence of Financial Advisors so that they will allow you to identify their customers with the most urgent needs and concerns related to life insurance product based wealth management solutions. The wholesaler will meet with the Financial Advisor and their customer to support the product sales process. The wholesaler will also create and provide business plans, sales goals, training and support for producers. Builds and maintains strong relationships to foster and build sales growth.

Responsibilities

- Independently service assigned accounts.
- Develop and cultivate client base.
- Drive product sales.
- Assist with developing business plans, producer training, prospecting support, and point of sale work.
- May conduct product training and product sales seminars.
- Identify client needs and available resources to support planned sales activity.
- Provide information needed to generate reports to track activities, progress and develop strategies.
- Utilize data, market trends, and industry knowledge to develop and implement a personal business and marketing plan
- Demonstrate outstanding client service by helping clients meet their financial goals.
- Develop a business plan to drive sales and meet objectives.
- Performs other duties as assigned or required.

Requirements

- Must be able to develop and maintain agent relationships.
- Regular in person contact with **A List** brokers: Top 50 – Call at least once a month and face to face at least once a quarter.)
- Must have current knowledge of marketing trends and case design techniques and be able to communicate and present concepts effectively.
- Cross sell (Annuities, LTC and DI)
- Timely response time when dealing with advisor and other internal staff at the agency.

