

Internal Wholesaler Job Description:

The Internal Wholesaler assists in raising and retaining assets within a geographic territory by making proactive phone calls to financial advisers to share sales ideas, provide product information, investment updates and offer sales support. This individual develops and maintains relationships with existing financial advisers in order to sell IVA funds and identifies new sales opportunities. The Internal Wholesaler also develops and implements a business plan and sales strategy taking direction from the territory's External Wholesaler.

The Internal Wholesaler must have an understanding of and passion for investments, the sales process, as well as excellent verbal and written communications skills. He or she must also have excellent organizational and follow up skills, and the ability to handle multiple responsibilities simultaneously. Moreover, the Internal Wholesaler must demonstrate professional presence, poise, strong presentation skills, and a high level of energy and motivation.

Responsibilities:

- Build, grow, and maintain advisor relationships by developing a thorough understanding of IVA funds and successfully educating advisors
- Achieve sales and sales activity goals
- Identify opportunities and moves clients through the sales process
- Work as a team with the External Wholesaler to uncover new opportunities
- Develop a thorough understanding of the capital markets, the investment management industry, and marketplace developments
- Assess the needs of each client by asking targeted, high impact questions to ultimately identify the correct prospects and service existing clients
- Proactively support team initiatives and complete special projects and other duties as assigned
- Work closely with the operations team to solve any client issues
- Coordinate with marketing team to ensure all materials and communications are sent appropriately
- Assist in any administrative duties for team as requested

Qualifications

Basic Qualifications:

- Bachelors Degree
- FINRA Series 7 and 63 licenses in good standing
- At least 3 years of experience in the financial services industry
- Proficiency with Microsoft Office and CRM system

Contact:

For consideration, please submit resume and cover letter to **resumes@ivafunds.com**