Internal Sales/Wholesaler - LCA

In partnership with the external wholesaler, the internal wholesaler is responsible for developing and maintaining existing relationships, as well as identifying and acquiring new business within their territory to meet sales goals. Continuous training is provided to develop and enhance industry and product knowledge in order to effectively communicate and build credibility with financial advisers.

The Internal Wholesaler is responsible for raising and retaining assets within a geographic territory by making proactive phone calls to advisers to share sales ideas, provide product information, gather marketing data and offer sales support. These calls include delivering effective sales presentations.

This individual develops and maintains relationships with existing advisers in order to sell LCA portfolios, as well as identify new sales opportunities. The Internal Wholesaler is additionally responsible for implementing a business plan and sales strategy with the external wholesalers.

Minimum Requirements:

- Bachelor's Degree in Business Administration, Finance, Economics, Marketing, or related field.
- Three (3) years of sales experience within the financial services industry. Prior experience in the independent, Insurance Broker Dealer and RIA channels a plus.
- Knowledge of investment services products, services, and operations. TAMP experience a plus.
- Proven sales skills and the ability to positively promote products and services to would be clients.
- Excellent presentation, communication, written and verbal skills
- Strong proficiency using Microsoft Word, Excel, and PowerPoint. Sales Force a plus.
- Experience in the independent BD market.
- Ability to work independently
- Ability to travel 20% of the time
- Series 65 and 63 registrations

Primary Responsibilities:

- Proactively calls on top tier advisors at various broker/dealers and RIA firms to communicate strategies that increase LCA portfolio sales.
- Effectively profile advisors to understand their practice, clients and investment process to identify needs and to position LCA's products and services to meet those needs.
- Provide portfolio construction and practice management support to financial advisors to help them strengthen their client relationships and grow their business.
- Execute consistent follow up with advisors (via Sales Force) to advance the sales process and deepen advisor relationships.
- Present the LCA Advantage and other potential webinar trainings to advisors.
- Partner with Regional Directors to drive sales and assets and build relationships with advisors through execution of a defined territory plan and sales process.
- Provides support for external wholesalers as home office point of contact and resolves complex questions regarding the portfolio choices, investment commentary, and practice management solutions.
- Demonstrate organized, efficient and effective territory management and phone skills on a consistent basis.
- Focus on deepening relationships with existing advisors and identifying new sales opportunities.
- Must have a strong ability to multitask and prioritize while maintaining a flexible approach in a fast paced environment.

Compensation:

- Compensation is paid by a base salary, plus quarterly fee bonus.

Benefits:

- Medical, Dental and Vision coverage
- 401(k)

Please email resume and cover letter to kborchardt@lindnercapital.com