Regional Associate

Position Summary: The Regional Associate is responsible for contacting and profiling new and existing Investment Advisor Representatives (IARs) within a specific geographic territory. Responsible for all meeting planning and scheduling for the Regional Director whether in-person or via WebEx in a defined territory.

Primary Roles and Responsibilities:

- Contact IARs through, but not limited to daily phone calls and emails to introduce WBI and its products.
- CRM utilization and management
    - Identify potential sales opportunities.
    - Generate call lists for a defined territory
    - Continuously track and monitor all calls, emails and notes in the CRM system.
- Profile and educate the prospective and/or current IAR. Match WBI products with advisor needs/wants.
- Effectively and consistently tell the WBI story with passion and conviction.
- Prospecting financial advisors to continuously establish new producers for the territory and WBI.
- Partner with the Regional Director on the execution of a specific territory plan. Manage the territory rotation.
- Responsible for scheduling all WebEx's and in-person meetings for Regional Director.
- Leverage technology to further partner with advisors in the form of WebEx's and conference calls.
- Work towards achieving or surpassing quarterly sales goals.
- Maintain existing advisor relationships by contacting all existing advisors on a monthly basis, and identify new opportunities.
- Provide value added information and excellent client service with existing advisors in order to build the relationship.
- Utilize marketing materials to facilitate the WBI message and continued education.
- Collaboration with all levels within the team and working with other teams
- Other projects and duties as assigned

Required Qualifications:

- Bachelor's degree
- 2-3 years of sales experience, strong drive and self-motivated
- Series 7, Series 66, or both Series 63 and Series 65
- Strong telephonic skills and etiquette
- Excellent presentation skills
- Highly motivated, tenacious and hard working
- Experience using a CRM system
- Effectively listen and establish relationships with financial advisors
- Organizational skills and time management
- Excellent written and verbal communication skills
- Detail oriented
- Strong team building skills
- Proficient with Microsoft Office