Regional Director

Position Summary: The Regional Director directs and closes sales of WBI's products through Broker Dealer Channels to Investment Advisor Representatives (IARs), IARs in Wire-House/Bank Channels and to Independent RIA's within a specific geographic territory. The Regional Director is also responsible for managing the sales within a specific territory and ensuring that the sales process and pipeline is managed effectively.

Primary Roles and Responsibilities:

- Build, maintain and develop relationships on behalf of WBI with IARs in a defined territory.
- Direct and close sales of WBI products.
- Develop and manage the territory pipeline.
- Contact IARs through, but not limited to phone calls and emails to schedule regular conference calls, WebEx, or in-person meetings in order to build relationships and close business.
- Partner with the Internal Sales Associate on the planning and execution of a specific territory plan. Maintain a three-month zone rotation on calendar.
- Work towards achieving or surpassing quarterly sales goals.
- Effectively and consistently tell the WBI story with passion and conviction.
- Utilize the CRM system to establish list of hot/warm prospects.
- 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.
- Must travel in territory approximately 50-75% of time.
- Other projects and duties as assigned.

Required Qualifications:

- Bachelor degree
- 7+ years of experience as a Regional Director (External Wholesaler)
- Series 7, Series 66, or both Series 63 and Series 65
- Previous wholesaling experience covering Texas is preferred.
- Strong telephonic skills and etiquette
- Excellent presentation skills
- Demonstrated professionalism
- 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