

POSITION AVAILABLE

Investment Representative: IR

(Los Angeles region)



Our client is one of the world's largest providers of financial services. The firm is a leading provider of investment management, retirement planning, portfolio guidance, brokerage, benefits outsourcing and many other financial products and services to more than 20 million individuals and institutions, as well as through 5,000 financial intermediary firms

The Investments Representative position serves as one of the first points of branch contact for walk in customers and prospects. This position will be responsible for initiating customer relationships through walk-ins and phone contacts. This position will be required to participate in and/or present branch seminars, call out nights and sales campaigns. This position may also function as a branch product coordinator, providing branch wide guidance on product and/or sales techniques for assigned area.

Duties and Responsibilities

- Provide direction to new customers by being responsive to customer needs, inquiries and requests
- Cross sell products and services
- Oversee resolution of some service issues as needed
- Organize and assist with the delivery of local branch seminars and ensure appropriate follow-up from these seminars
- Address routine and non routine inquiries from customers and prospects
- Proactive inbound/outbound sales

- Seek referral opportunities and follow up on leads
- Partner with Financial Planning Consultant on complex client/prospect business opportunity
- Participate in execution of local marketing development plan

Qualifications

- Two or more years in financial services with an emphasis on customer service/sales
- Series 7 & 63 required prior to hire
- Series 65 must be obtained within 3 months of hire unless already has the 66 combo
- Insurance Licenses required (or to be obtained within 6 months of hire)
- Sales skills including product knowledge, presenting multiple options and proactive outbound calling efforts, ability to compare and contrast investments
- Demonstrated effective use of consultative skills, PC Skills and system knowledge
- Must have proven track record in relationship management and customer satisfaction plus be able to work with all levels of customers, managers and employees.

Send Resume if interested: info@willis-consulting.com

Compensation is salary plus bonus

Experienced. Discreet. Independent.