



## Internal Wholesaler

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### LoCorr Funds Sales Opportunity

LoCorr Funds, a leading distributor of alternative/low correlating investment solutions, is rapidly expanding its Internal Sales Desk. There continues to be a significant shift of asset flows into alternative investment asset classes and we are well-positioned to capitalize on this extraordinary opportunity. We distribute multiple low-correlating investment solutions (including best-in-class alternative mutual funds and other public and private funds) primarily in the Regional, Independent and Wirehouse Broker Dealer channels.

### Job Description

#### The Role

Do you thrive in a dynamic environment, within a rapidly growing industry, where you can have a direct impact on future growth? As an Internal Wholesaler, you will be responsible for promoting and consultative selling a suite of solutions to current and prospective financial advisors across multiple distribution channels. This is an excellent opportunity for someone who wants to gain exposure and build a career in sales.

#### The Team

As an Internal Partner, you will have an opportunity to work with a team of enthusiastic, goal-oriented wholesalers who are focused on proactively driving sales results while balancing the ongoing multitasking and time management challenges that go along with sales. Additionally, you will work closely with National Accounts and the Research team to deliver timely and relevant sales ideas, marketing initiatives, and performance analytics to advisors. We value partnership and it is crucial that you are a team player in order to be successful within our organization.

#### The Impact

Your contribution and dedication to your role is critical as you can have a direct impact on sales generation. By working in partnership with external wholesalers, you will have the opportunity to learn our clients' business and help identify their needs, while providing solutions utilizing our products and tools.

#### What's in it for you?

- Significant growth potential
- Collaborative work environment, with regular mentoring from peers and leadership
- High visibility role, interacting with advisors daily

#### Role & Responsibilities

The role of the Internal Wholesaler is to grow overall sales in the multiple distribution channels they serve through the following responsibilities:

- Create and identify sales opportunities through proactive (outbound) and reactive (inbound) calls with financial advisors
- Presenting sales ideas, asking appropriate questions while delivering the LoCorr Funds message
- Educate and sell the benefits of LoCorr Funds offerings
- Provide general sales support and work closely with Regional External Wholesaler to grow producing advisors, schedule meetings, and expand reach of distribution

- Maintain contact management database and create proactive campaigns based on territory opportunities
- Participate in the formulation and implementation of new marketing initiatives and business planning
- Utilize systems, technology and tools to track activities and profile advisor data in effort to expand reach of product distribution

### **Key Attributes**

- Ambition, passion, drive and a hunger for sales
- Confidence in cold calling and dealing with financial advisors over the phone
- Positive, proactive attitude and ability to work well in teams
- Goal and action oriented, with ability to organize, multi-task and prioritize
- Bachelor's degree in business or finance
- 2 yrs+ industry and sales experience preferred
- Proficiency in the use of personal computers, Salesforce CRM and MS Office Suite

### **Benefits Offered**

- 401(k)
- 401(k) Matching
- Paid Time Off
- Parental Leave
- Health Insurance
- Dental Insurance
- Vision Insurance
- Healthcare spending or reimbursement accounts such as HSAs or FSAs
- Retirement Benefits or Accounts
- Workplace perks such as food/coffee
- Flexible Work Schedules
- Flexible Spending Account
- Referral Program

**Job Type:** Full-time (8 shifts, Monday to Friday)

**Work Location:** Excelsior Office

**Experience:** 2 years in Sales and Financial Concepts (Preferred)

**Education:** Bachelor's in business or finance (Preferred)

**License/Certification:** FINRA Series 6 and 63 required, 7 preferred

**Paid Training:** Yes

**Compensation:** Based on Experience – Salary and Bonus Incentives

### **Supplemental Pay Types:**

- Bonus pay
- Commission pay