



Title: Hybrid Annuity Wholesaler

Reports to: Director, Annuity Sales

Department: Annuity Sales

Status: Full-Time, Exempt

Location: Charlotte, NC – Mint Hill Preferred, Remote viable for right candidate

Elevate Your Career at CreativeOne!

Looking for a dynamic and rewarding career in financial services? Join us at CreativeOne, where we blend collaboration, innovation, and excellence to forge a path in the financial services industry. We pride ourselves on being a nationally recognized leader, devoted to empowering independent financial advisors with superior services.

We're Building a Better Financial Future, Together

We take immense pride in our work and are in search of like-minded individuals who are eager to make a significant impact. If you are ready to be a part of a team that's shaping the future of financial services, we would love to hear from you.

Position Summary:

Do you enjoy connecting with people to promote products that can improve the financial well-being of customers? If you can form meaningful relationships, work in a driven sales environment, and proactively solve challenges while giving outstanding service and support we want to know more about you!

As a Hybrid Wholesaler, you'll market annuity products across the spectrum of our offerings mainly registered and buffered annuities through various financial institutions and financial professionals primarily with independent broker dealers, and Registered Investment Advisors (RIAs).

Key Responsibilities:

- Identifies and connects with prospective financial advisors to promote annuity products and services. Maintains relationships with existing advisors to strengthen relationships.
- Consults with advisors by analyzing financial services products to determine the best solutions for their business and clients. Finds opportunities where annuity products make sense and educates the advisor through webinars and primarily virtual meetings on how to incorporate these opportunities into their clients' portfolios. Evaluates and recommends solutions to marketing strategy and product questions.
- Utilizes internal and external sales and marketing technology and databases to acquire, grow, and retain a group of producers across the United States
- Develops and executes business plans to improve productivity and ensure company objectives are met. Creates and maintains accurate data in building advisor profiles.
- Acts as a liaison with corporate/home office sales and operations teams.
- Provides sales management with weekly updates on sales activity within the assigned territory.
- Provides coaching, mentorship, and development advice to less experienced members of the team.
- Partners with other wholesalers to cross-sell when appropriate and build a "one team" CreativeOne experience for advisors.
- May perform other responsibilities as assigned.

Preferred Skills and Abilities

- 5 or more years sales experience in the insurance or financial services industry preferred
- Knowledge of insurance products and the consultative sales process preferred
- Very strong interpersonal, presentation, facilitation, and consultation skills.
- Degree or comparable experience in business, sales, finance, economics, or digital sales and marketing preferred
- FINRA Series 6 or 7, Series 63 and State Life/Annuity Insurance Agent licenses required at start of employment or within 6 months of starting role
- Excellent verbal and written communication skills vital for interacting with all levels of customers.
- Ability to build and maintain strong working relationships with business partners.
- Ability to analyze financial services products to determine the best solutions for advisors and their clients.
- Ability to evaluate and recommend solutions to marketing strategy and product questions.
- Must have a drive for results, demonstrate independent judgement and decision making, possess consultative/advising skills, have good time management, and balance multiple priorities.
- Some travel to assigned territories may be required, typically 6-8 trips per year based on scheduled meetings and territory location. Normal office environment when not traveling (Charlotte NC – Mint Hill).

This description covers the major purpose and major functions of the job. It is not intended to give all details or a step-by-step account of the way each task is to be performed. Employees may receive other job-related instructions and be required to perform other job-related duties requested by their supervisor. All requirements are subject to possible modification to provide reasonable accommodation to qualified individuals with disabilities.

CreativeOne provides equal employment opportunities to all employees and applicants for employment and prohibits discrimination and harassment of any type without regard to race, color, religion, age, sex, national origin, disability status, genetics, protected veteran status, sexual orientation, gender identity or expression, or any other characteristic protected by federal, state or local laws.

Our company does not currently sponsor employment visas. Applicants must be authorized to work for any employer in the U.S.