TITLE	LOCATION	CLASSIFICATION
Internal Wholesaler – Institutional Sales	Madison, WI	Full Time

Based in Wisconsin's capital city since its founding in 1974, Madison has grown from a local firm into a nationally recognized asset manager entrusted with assets across a suite of mutual funds, managed accounts and customized portfolios. The catalyst for Madison's growth has been a management style that looks beyond short-term trends, emphasizing the performance of investments over full market cycles. Our highly-credentialed portfolio managers, analysts and traders share a belief in high-conviction, risk-conscious investing, and have the autonomy to shape this approach within their own investment teams. For more information, please visit www.madisoninvestments.com

POSITION DESCRIPTION

We are currently seeking an Internal Wholesaler to join our growing team and business. This position will work closely within our Institutional sales and service team. Madison focuses on 3 segments of the Institutional business: the traditional consultant market, credit union asset management, and insurance asset management. Our team collectively provides sales support and service to our outside consultant partners. Support is provided via phone, webinars, and face to face on identified Madison investment products. As a small and focused group, this position will be involved in many aspects of the overall distribution business as an internal resource. Travel may be required.

Primary Responsibilities & Duties

- Partner with the Director of Institutional Business to help develop new sales opportunities across the country.
- Provide proactive outbound product and sales support to prospective consultant relationships.
- Maintain and build relationships with existing Institutional client relationships.
- Help organize the multiple business channels within the Institutional business.
- Maintain multiple databases on a quarterly basis
- Respond to client inquiries, due diligence questionnaires, and RFPs within posted deadlines.
- Update the CRM system daily which includes adding leads, prospects and sales activities.
- Additional tasks may be required.

Qualifications & Skills

- Bachelor's Degree.
- Active FINRA Series 6 license is required.
- Active FINRA Series 63 license is required (or within 90 days of employment).
- Previous work experience within a sales team desired.
- Prior experience working with consultants, foundations, endowments, and/or public pension funds is a plus.
- Demonstrated ability to effectively manage relationships with clients, advisors, and strategic business partners.
- Ability to multi-task responsibilities is essential.
- Excellent organizational, problem-solving, presentation, and oral and written communication skills required.
- Ability to work as part of a team in a fast paced, entrepreneurial environment.
- An interest in capital markets and the financial industry.

Applicant should submit a cover letter and resume to jobs.sales@madisonadv.com