

Custodia Financial – Inside Sales Representative

Custodia Financial is seeking an inside sales representative to help advance the distribution of Retirement Loan Eraser, our program to prevent 401(k) loan defaults.

The primary responsibility of the Internal Sales Representative is to become an impactful member of the distribution team through coordination with the Custodia external distribution team and will generate engagement with plan sponsors, consultants and advisors, as well as assist in the ongoing sales process.

Primary Responsibilities

- Through clear articulation of the Retirement Loan Eraser value proposition, generate qualified meetings with plan sponsors for Custodia's external distribution team
- Effectively communicate the benefits of the RLE program to prospective plan sponsors, and their advisors/consultants.
- Understand the sales process from prospecting through RFP through finals through conversion through live date.
- Support all marketing events through coordinated calling activities.
- Respond to sponsor, advisor and consultant inquiries and escalate issues as appropriate to sales and/or ongoing service team.
- Coordinate RFP/RFI/Proposal activity.
- Research sponsor marketplace and identify appropriate contacts at targeted prospects.
- Manage and maintain all activity in Salesforce.
- Coordinate closely with Custodia external distribution team.

Qualifications

- Goal orientation
- Bachelor's degree in business or a related field
- Understanding of the retirement plan services industry
- Demonstrated ability to plan, organize, and prioritize
- Strong analytical and problem-solving skills
- Excellent oral and written communication skills
- Proficiency with Salesforce, MS Word, Excel, PowerPoint, & Adobe Acrobat
- 1-2 years financial services experience; call center or phone-based selling experience a plus

Location: Custodia Financial Corporate Offices – Dallas, TX

Working Conditions: Normal office working conditions; minimal travel required.

Candidates should submit resume to jobs@custodiafinancial.com