RETIREMENT PLAN INTERNAL WHOLESALER

Job Description

RMC Group is seeking an entry-level Internal Wholesaler to support our Retirement Plan Sales Team. This inside sales role focuses on prospecting, qualifying opportunities, scheduling appointments, and coordinating follow-up to help the outside sales representatives develop new business. You will connect with business owners, plan sponsors, centers of influence, and strategic partners while learning about Defined Benefit and Defined Contribution Retirement Plan solutions, including arrangements funded through group annuity contracts and life insurance where appropriate. Prior sales or retirement plan industry experience is a plus but not required. We are willing to train the right candidate who demonstrates initiative, a strong work ethic, a positive attitude, and a genuine interest in building a career in the retirement plan industry.

Responsibilities

- Conduct outbound calls and email outreach to prospective business owners, plan sponsors, referral sources, and strategic partners using approved messaging.
- Respond to inbound inquiries, gather preliminary information, and identify prospects for follow-up by the Retirement Plan Sales Representative.
- Schedule and confirm discovery calls, meetings, and presentations; prepare background notes and coordinate calendars.
- Maintain accurate contact records, outreach activity, opportunity status, and next steps in the customer relationship management system.
- Help collect prospect information and coordinate with the sales, plan design, and administration teams to support proposal preparation.
- Prepare and distribute approved sales materials and assist with presentation and meeting preparation.
- Follow up on outreach campaigns, proposals, and outstanding information requests to keep opportunities moving forward.
- Support referral development and ongoing communication with centers of influence and strategic partners.
- Develop a working knowledge of RMC's retirement plan services, sales process, and relevant insurance solutions through training and collaboration.
- Work toward established outreach, qualified appointment, follow-up, and sales support goals.
- Follow company policies, protect confidential prospect and client information, and refer technical, tax, legal, investment, and insurance recommendations to appropriately qualified team members.

Education & Qualifications

- Sales-driven mindset with a desire to contribute to business growth and team success.
- Self-motivated, proactive, and able to work independently while supporting a collaborative sales team.
- Strong organizational skills and the ability to manage multiple priorities and deadlines.
- Excellent verbal and written communication skills.
- Comfortable with prospecting activities, outreach, and supporting sales initiatives.
- Ability to prepare proposals, coordinate meetings, and manage follow-up activities.
- Detail-oriented with the ability to assist with retirement plan applications, paperwork, and required documentation.
- Ability to coordinate and manage the step-by-step implementation process, from signed application through installation and client onboarding.

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- Strong follow-through and commitment to providing excellent client experience
- Working knowledge of Microsoft Word, Excel, Outlook, and PowerPoint; willingness to learn CRM and retirement plan software.
- Experience with HubSpot, PensionPro, or PlanGen is helpful but not required.
- Bachelor's degree helpful but not required.
- Willingness to complete role-specific training and obtain any licenses required for assigned duties before performing activities that require licensing.

Compensation
The annual base salary range is $35,000–$40,000, plus commission. Commission eligibility, structure, and payment terms will be outlined in the applicable compensation plan.

What We Offer at RMC

- Medical, vision, and dental insurance
- Life and short/long term disability insurance
- Paid vacation and holidays
- Flextime work schedules
- 401(k) with company match
- Career advancement and development opportunities

Location
Remote, but candidate will be expected to train onsite in Tucson, AZ as part of the onboarding process.

About RMC Group
RMC is an international provider of risk management and actuarial consulting services. RMC specializes in the design and administration of innovative risk management and insurance products for small-to-medium sized businesses. RMC offers a wide range of services which include property & casualty solutions, life, health & annuity solutions, traditional insurance, insurance-based corporate finance solutions, comprehensive risk management, along with a wide variety of employee benefit plan programs and solutions. Visit **rmcgp.com** for more information.