

# Distribution Sales Strategist Job Description

## Open Position

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**Job Title:** Distribution Sales Strategist

**Reports To:** National Sales Director

**Department:** Sales

**Type:** Full-Time salaried position

**Salary:** \$95K + depending on experience

### Position Summary

The Distribution Sales Strategist is a key player in Legacy's IMO engagement and growth strategy. This individual will build meaningful relationships with internal IMO marketers, high-producing insurance agents, and financial advisors, while delivering advanced sales consultation, strategic insights, and business development support. With a strong understanding of annuity products and the independent financial services landscape, the Distribution Sales Strategist will be instrumental in helping with business development in the IMO space while aligning their efforts and that of the internal marketers with Legacy's product positioning and marketing initiatives.

This role is both highly consultative and strategic, focused on providing expert guidance, influencing marketer behavior, and serving as a liaison across departments to enhance the overall client experience. In addition, this individual will help shape internal sales content, mentor team members, and represent Legacy in key projects and events.

### Core Responsibilities

- Lead proactive outreach and inbound consultation with IMO sales teams, insurance agents, and financial advisors.
- Serve as an internal partner to the Field Sales Trainer to fulfil IMO requests and coordinate virtual and in person training sessions.
- Guide marketers and advisors on advanced case design, product positioning, and competitive differentiation. Consult on practice growth opportunities using Legacy's proprietary products and tools.
- Maintain accurate IMO and advisor profiles to support marketing segmentation. Collaborate with the National Sales Leader and field sales trainer to optimize outreach strategies and enhance sales content.
- Serve as a field intelligence resource by reporting advisor insights and market trends to leadership to help shape future product development and sales initiatives.
- Act as a strategic peer resource and mentor within the team. Lead by example with product knowledge, competitive awareness, and a collaborative approach.
- Co-develop weekly, customer-focused sales content for team huddles and contribute thought leadership to broader sales training efforts.
- Participate in key company initiatives, represent Legacy during webinars (some internal and some external) and select events (travel <10%).

**Minimum Qualifications**

- Minimum 5 years of annuity industry experience (advisor-facing, wholesaling, or advanced sales)
- Strong background in consultative selling and strategic relationship development
- Proven communication skills (both written and verbal) with the ability to influence and educate
- Enthusiastic and positive mindset
- Experience working for an IMO/FMO preferred
- Intermediate proficiency with Microsoft Office Suite (Outlook, Excel, Word, PowerPoint)
- High-level problem-solving skills with the ability to remain composed under pressure
- Self-motivated and organized; able to thrive in a dynamic, fast-paced environment
- Ability to work independently and within a team (experience WFH preferred)

**Legacy Competencies & Cultural Expectations**

- Communicate Effectively – Build strong relationships through proactive and constructive communication
- Strive for Continuous Improvement – Pursue excellence in everything you do
- Remain Flexible – Support team and organizational needs beyond core responsibilities
- Align with Performance Goals – Deliver outcomes that support individual, departmental, and company goals
- Solve Problems Constructively – Address challenges with positive solutions and shared accountability
- Recognize and Elevate Others – Celebrate success and contribute to team momentum
- Support Team Growth – Share knowledge and participate in training and development