

Description

The Financial Intermediary Sales Executive will be responsible for selling OSAM's separately managed account strategies to Registered Investment Advisors, Wirehouse-based and Bank-based financial advisors in the Mid Western United States. He/She will be responsible for aggressively growing OSAM's revenues through the development and implementation of successful sales strategies. The Financial Intermediary Sales Executive will also be the lead service contact for clients within the territory.

The successful candidate is a seasoned sales professional (wholesaler) who has a proven track record of outstanding sales growth. Extensive experience in the Asset Management industry plus 5 years as a sales person is required. An existing client base within the financial advisory community is also required.

About the firm

O'Shaughnessy Asset Management is a Stamford, Connecticut based quantitative money management firm. We deliver a broad range of equity portfolios to institutional investors and the high-networth clients of financial advisors. We also serve as a sub-advisor to a family of mutual funds through the Royal Bank of Canada.

Responsibilities include

- Initiating and cultivating relationships with financial advisors
- Growing territory revenues
- Servicing client relationships
- Setting objectives with National Sales Manager

Required Skills/Experience

- Proven sales record within the financial services industry
- External wholesaling experience in the RIA, Merrill Lynch, UBS and Wells Fargo channels
- Strong working knowledge of operational issues associated with separately managed accounts
- Willingness to spend extensive time traveling
- Flexible, positive, "Whatever It Takes" attitude
- Excellent organizational, management, financial and sales abilities coupled with broad practical experience are required for this challenging job.

Education

- Bachelors Degree (MBA a plus)