

Canvas U.S. Retail Business Leader

Managing Director

O'Shaughnessy Asset Management (OSAM) is looking for a strong and entrepreneurial spirited leader to help expand our Custom Indexing Platform, [Canvas®](#). The U.S. Retail Business Leader will be responsible for establishing and growing Canvas within brokerage networks and critical to the future growth, innovation, and direction of OSAM. Today, over thirty independent-RIAs use Canvas to manage client money. As a result of success in this channel, the hire will further scale Canvas through the development and distribution of a BD/platform-focused version of Canvas. This role is a great opportunity for those seeking business ownership and a desire to combine their industry knowledge of advisors, home offices, separately managed accounts, and technology.

Key Responsibilities Include:

- Selling and Relationship Management
 - Partner with Franklin Templeton (FT) National Accounts team
 - Sell to home offices/platforms
 - Establish implementation roadmap once HQ approves
 - Leverage FT distribution leaders and teams to wholesale Canvas across platforms
- Team Building
 - Recruit and hire support teams
 - Relationship team(s)
 - Some combination of specialists and junior specialists that focus on national accounts, investment teams and key advisor teams
 - Expectation is to lead the initial relationship team
 - Client Support Desk
 - Staff and train specialist(s) to support financial advisors of brokerage partners
 - Effectively collaborate with OSAM Tech, Portfolio Management, Operations and Relationship Management teams
- Product Innovation and Project Management
 - Translate market needs into innovative solutions and work with OSAM Tech, Portfolio Management and Relationship teams to properly prioritize and execute ideas
 - Create marketing plans and materials for FT stakeholders, national account targets and financial advisors

Measures of Success:

The key measurements of success are winning placement on brokerage platforms and raising assets. In addition, the individual will be evaluated on their ability to build a strong team and sales process to successfully achieve KPIs. It will be critical that the hire can effectively advocate for development and other resources on behalf of the brokerage product while balancing the needs of the existing Canvas platform and its independent-RIA clients.

Key Skill Sets:

- Team builder
- Excellent communicator
- Success selling to advisors
- Passion for collaborating with financial advisors, working to improve their businesses
- Keen curiosity and ability to understand details of investment processes and practices
- Experience with SMA operational requirements throughout the financial advisor ecosystem, especially advisors at brokerage firms
- Experience working with gatekeepers, home office environments
- Effective facilitator of innovation
- Team player
- Have the flexibility to modify a plan as necessary yet the discipline to stay with a plan, especially to avoid project creep

Reporting Structure:

This position reports directly to Chris Loveless, President of OSAM.

Location:

CT/NY area preferred although not required. Working remote at least some of the time is expected.

About the Firm: O'Shaughnessy Asset Management (OSAM) is a research and money management firm based in Stamford, CT. On December 31, 2021, [OSAM was acquired by Franklin Templeton](#). We manage approximately \$7.8 billion* in assets for institutions and financial advisors. Our approach to managing money is transparent, logical, and completely disciplined, leading to long-standing relationships with our clients. We are a leading provider of [Custom Indexing services](#) via Canvas. Canvas is our proprietary platform that offers financial advisors an unprecedented level of control and ease in creating and managing client portfolios in separately managed accounts (SMAs). With Canvas, advisors can build custom investment templates, access factor and passive investing strategies, actively manage taxes, and apply ESG tilts and screens according to the specific needs, preferences, and objectives of individual clients.

For more information on our firm, please visit our website at www.osam.com. Applications should be submitted [here](#).

* As of 3/31/2022. O'Shaughnessy Asset Management's \$7.8 billion AUM and AUA combined total represents \$7.2 billion in assets under management and \$0.6 billion in assets under advisement. The information regarding AUA is supplemental, OSAM does not have control over the assets under advisement, implementation of the models, or execution of the trades. Numbers may not add up due to rounding.