

## **Managing Director Powered by Canvas (PBC) Business Leader**

The mandate is to develop and grow the business for OSAM's Canvas distribution through organizations with advisors within B/D networks, using a more simplified version of Canvas. Additional functionality includes allowing non-OSAM managers (including fixed income) to have their portfolios available on the platform and trade using our tax management processes. As this functionality comes online, Canvas partners will utilize it as well.

### **Key responsibilities for the role include:**

1. Selling and Relationship Management
  - FT National Accounts team
  - Home Office/Platforms
    - Strategy for implementation once HQ approves
  - FT Distribution leaders and teams
    - Once win platforms, need to wholesale for adoption and growth
2. Team Builder
  - Recruit and hire support team
    - Relationship team (Pods)
      - Specialist, junior specialist – focused on national accounts, investment teams and key advisor teams
      - Expectation is to be the initial Pod leader
    - Client Support Desk
      - Staff and train specialist to support advisors utilizing this version of Canvas
  - Work in concert with the OSAM teams: Tech, Portfolio Management, Operations and Relationship management
3. Project Management
  - Translating market needs, working with OSAM Tech, PM and Relationship teams to properly prioritize and execute
  - Developing and executing marketing plans for FT stakeholders, National Account targets and the advisors associated with PBC

### **Measures of Success:**

Winning placement on B/D platforms and raising assets is the primary measurement of success. Doing that in concert with the rest of the Canvas business will be a necessary requirement. Balancing the needs of existing Canvas development and priorities while effectively advocating for development resources will be one of the primary challenges of this role.

### Key Skill Sets:

- Team builder
- Excellent communicator
- Success selling to advisors
- Passion for collaborating with financial advisors, working to improve their business
- 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 BDs
- Experience working with gatekeepers, home office environments
- Effective facilitator of innovation
- Team player
- Have the flexibility to modify a plan as necessary but yet the discipline to stay with a plan as necessary, especially to avoid project creep

### Reporting Structure:

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

### Location:

- CT/NY area is 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](#). OSAM manages 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](http://www.osam.com). Resumes can be sent to [careers@osam.com](mailto:careers@osam.com).

\* 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.