

Relationship Management Associate

The Relationship Management Associate will support OSAM's business development/client service efforts and will primarily collaborate with the Relationship Managers on prospecting, onboarding, and maintaining relationships with high-end Registered Investment Advisors (RIAs). The need for this hire is driven by the growth of [Canvas®](#), OSAM's Custom Indexing platform designed to improve the relationship between asset managers and allocators.

Key responsibilities of the position include:

- Work closely with Relationship Managers to build a pipeline of advisor prospects and help to qualify new business development leads
- Coordinate and attend meetings with current and prospective clients; take ownership of CRM maintenance
- Develop an in-depth understanding of Canvas workflows and OSAM's investment/portfolio management process
- Prepare client-focused marketing and education collateral based on internal and external requests
- Facilitate account service and operational requests in a timely manner
- Support growth efforts by coordinating across sales, operations, and Portfolio Management teams

Highly Desirable:

- Minimum of 2 years related work experience in Financial Services industry
- Strong knowledge of equity investment landscape, portfolio management, financial planning, taxes
- Experience working with financial advisors
- High degree of comfort with technology
- Effective listener, communicator, and presenter
- Ability to effectively problem solve in a timely manner
- Must maintain strong working relationships both internally and with external clients
- Superior work ethic and attention to detail
- Comfortable working in a fast-paced environment
- Ability to manage multiple tasks effectively
- Self-starter, able to proactively identify opportunities for process improvement

Location:

- CT/NY area is preferred but not required. Open to candidates anywhere in the U.S.

Compensation/benefits:

- To include salary, discretionary bonus, health insurance, vacation, and industry training

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, visit our website at www.osam.com. Please send resumes to Pat McStay at Patrick.mcstay@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.