

## Sales Coordinator

The Sales Coordinator provides administrative and project management support to the OSAM client facing team. They are focused on being a valued partner by enabling them to primarily focus on client engagement activities to accelerate growth and retain assets.

### Key responsibilities for the role include:

Act as administrative subject matter expert and point of contact for general inquiries.

- Manage calendars for meetings and events
- Assist with data entry and ongoing management of CRM system
- Coordinate the setup and execution of local meetings and conferences
- Create needed materials from existing sources
- Send promotional items and marketing materials
- Manage travel and expense reporting as well as invoice processing
- Set up travel for team member business needs
- Support managing client's procedures for getting materials approved and distributed through their systems
- Manage fulfillment of necessary reports for the team's leadership
- Comfort with data and data sources to extract necessary data
- Manage and maintain quality relationships with the client facing team
- Identify/recommend administrative workflow efficiencies and present process improvement opportunities to supervisor and/or upper management
- Champion new initiatives and partner with management on initiatives to increase revenue and achieve sales objectives for territories supported

### Key Skill Sets:

- Bachelor's Degree or equivalent experience
- 5+ years administrative experience in professional environment
- Advanced MS Office skills
- Experience in the Financial Services Industry recommended
- Excel: Forms, Formulas, Functions, Pivot Tables, Graphs
- Proven ability to perform multiple tasks in a fast-paced, team environment
- Excellent verbal and written communication skills
- Solid organizational skills; ability to organize and maintain accurate, orderly files and records
- Strong attention to detail; ability to accurately proofread documents
- Strong customer service skills
- Excellent phone/Zoom etiquette
- Strong professional attitude and demeanor
- Flexibility to work independently and in a team environment

## Reporting structure and key stakeholders

- This position reports directly to Chris Loveless, President of OSAM.
- Key stakeholders include:
  - Claudine Spence, OSAM – Director of Client Services
  - Ari Rosenbaum, OSAM – Director of Financial Advisor Services/Senior Pod Leader for Canvas
  - Matt Greene, OSAM – Financial Advisor Services – Pod Leader for Canvas
  - Ehren Stanhope, OSAM – Client Portfolio Manager
  - Andy Iles, OSAM – Director of Marketing

## 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.