

Relationship Management Associate

The Relationship Management Associate will support OSAM's business development and client service efforts throughout each stage of the client journey. The successful candidate will be considered a key problem-solving resource to our clients, and will primarily collaborate with the Relationship Manager on prospecting, onboarding, and maintaining RIA relationships. The need for this hire is driven by the growth of CANVAS®, OSAM's revolutionary Custom Indexing platform designed to improve the relationship between asset managers and allocators.

Key responsibilities of the position include:

- Work closely with Relationship Manager to build a pipeline of advisor prospects and help to qualify new business development leads
- Coordinate and attend meetings with current and prospective clients, while developing your own presentation skills
- Develop an in-depth understanding of CANVAS® workflows and OSAM's investment/portfolio management process
- Take ownership of follow-up communication, next steps, and CRM maintenance
- Prepare allocator and advisor-specific marketing and education collateral based on internal and external requests
- Grow into being responsible for wholesaling into existing partner firms by increasing advisor use of CANVAS®
- Manage ongoing account service requests in a timely manner
- Support growth efforts by coordinating across sales, operations, and Portfolio Management teams

Highly desirable:

- 1-3 years of experience in asset management, investment management, or financial advisory
- Strong knowledge of equity investment landscape, portfolio management, financial planning
- Experience working with financial advisors
- Ability to effectively problem solve in a timely manner
- Must maintain strong working relationships both internally and with external clients
- Superior work ethic
- Comfortable working in a fast-paced environment
- Ability to manage multiple tasks effectively
- Self-starter, able to proactively identify opportunities for process improvement
- Strong time management and organizational skills
- Team player
- Intellectual curiosity

Location:

- CT/NY area is preferred but not a requirement. Open to candidates living anywhere in the US.

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 September 29, 2021 [OSAM agreed to be acquired by Franklin Templeton](#), with the acquisition expected to close around December 31, 2021. The firm manages approximately \$7 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 a platform offering financial advisors an unprecedented level of control and ease in creating and managing client portfolios in separately manages accounts (SMAs). Advisors can set up custom investment templates, access factor investing strategies, utilize passive strategies, actively manage taxes, and apply ESG investing and SRI 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. Resumes can be sent to careers@osam.com.