Job Title: National Accounts Associate

Department: RIA National Accounts

Job Reports To: VP, Senior National Accounts Manager, RIA

Job Summary:
Will assist in all aspects of account management including presentation and meeting preparation, data mining, following up on action points, reviewing contract information, and liaising with other business units. Should possess strong analytical, sales, and marketing skills that can be applied to help cover the company’s largest clients.

Major Responsibilities/Activities:
- General support of account management activities
- Preparation of client presentations that are professional, accurate, timely, and brand compliant
- Preparation of management and client reporting tools
- Maintenance of the CRM tool with account contacts and activity
- Following up on action points identified through client meetings and calls
- Supporting the contract renewal process
- Supporting the new business referral process
- The candidate will need to develop and maintain a high level of knowledge of the firm’s products and their application to the client base
- Will be required to establish productive working relationships with both internal and external parties.
- Liaise with various internal teams including Sales, Product Management, Finance, Support, and Marketing to provide deliverables to the client
- Provide support to key account contacts to enhance the relationships and encourage new leads through a high level of customer satisfaction

Minimum Requirements
- Bachelor’s degree
- Series 6 or 7 license
- 3 to 5 years of experience in a client service/sales role in asset management

Beneficial Skills and Abilities
- Excellent communication skills – written and verbal
- Some experience selling or marketing investment products
- Knowledge of the mutual fund industry, broker/dealer and investment advisor community necessary
- Team oriented
High level of competency on PowerPoint, Excel & Word
Flexible and willing to adapt to changing situations
Strong influencing skills
High standard of analytical and written work
Displays energy, drive and stamina

**Working Conditions**
- Travel may be necessary – approximately 10%