HEARTLAND ADVISORS
AMERICA'S VALUE INVESTOR®

JOB DESCRIPTION

DEPARTMENT: *Sales*

POSITION: *Relationship Manager*

REPORTS TO: *Vice President of Sales*

DIRECT REPORTS: *N/A*

SUMMARY:

This role requires new business development and relationship management of clients and prospects in a geographic territory across all channels of distribution.

ACCOUNTABILITIES:

I. Serves as the relationship manager for new accounts as well as any existing accounts that are assigned, providing our clients with excellent customer service. This includes developing strong relationships with the clients, maintaining regular communications and serving as the primary contact between portfolio managers and clients.

II. Develop and maintain a strong knowledge of the Firm's investment strategies and product offerings.

III. Work closely with the Vice President of Sales to build and maintain a plan for maximizing new opportunities and retaining existing clients.

IV. Work closely with internal resources to develop timely and relevant marketing materials.

V. Provide internal feedback from the marketplace as the voice of the client.

VI. Manage a geographic territory efficiently.

VII. Other duties as assigned.

REQUIREMENTS:

- Proven track record of success in selling and servicing across distribution channels.
- Bachelor's degree in business/finance, CIMA or CFA preferred
- Highly ethical with a strong regard for compliance policies and procedures
- Well groomed and professional appearance at all times.
- At least seven years of business experience in the financial services industry, primarily focused on third party distribution.
- FINRA Series 7 and 66 licenses.
- Excellent communication, interpersonal and time management skills.
- Ability and willingness to travel.
- Flexibility in schedule and location to meet with clients and prospects at their convenience.
- Team player with a strong work ethic and the ability to function in a fast paced, results oriented environment.