

## **JOB DESCRIPTION**

**JOB TITLE:** Account Management Associate/Senior Associate

### **POSITION SUMMARY**

In-house account manager whose primary responsibilities will include servicing clients, client renewals, selling product upgrades, and managing existing accounts. The ideal candidate will be able to train clients, organize discussions between clients and internal research team, obtain answers to client questions, and retain existing clients. Requires significant team work with sales group and interaction with Sales Director.

### **DUTIES AND RESPONSIBILITIES:**

- Renew existing accounts with increased service levels and pricing.
- Upgrade services to include other product offers.
- Assist with transitioning new clients from salesperson to account manager.
- Train clients on research service, methodology, reports, and company website.
- Set up conference calls between clients and research staff.
- Acquire and effectively communicate responses to client questions.
- Work with Sales Director and Marketing team to come up with new outbound marketing ideas. Provide input to team to help develop client programs.
- Provide feedback from clients to assess possible refinements to existing products and the need for new products.
- Prepare renewal quotes and contracts for existing clients.
- Maintain accurate customer database of industry contacts for mailings, reporting, and marketing programs.
- Consistently provide detailed updates on activities to Sales Director.
- Contribute to team effort and works on special projects.

### **REQUIRED QUALIFICATIONS:**

- 4 year Bachelor's degree
- Minimum of 3 years experience in a financial sales or customer service environment.
- Superior customer service skills and a desire to help people.
- Sales-driven personality and a competitive nature.
- Excellent communication skills, both verbal and written.
- Competent computer skills to perform essential functions listed above (Word, Excel, PowerPoint, and Access).
- Well-developed presentation skills.
- Fundamental understanding of financial industry (mutual funds, hedge funds, stocks, bonds, etc )
- Must have or be able to obtain Series 7 and 63 licenses within 60-90 days of employment.
- Knowledge of the commercial real estate industry a plus.

Please list "Account Management Associate" in the subject line of the email. Please do not contact our employees directly.

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