



Example of Third Party Distribution Job Description

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Our growing company is hiring for a third party distribution. Thank you in advance for taking a look at the list of responsibilities and qualifications. We look forward to reviewing your resume.

Responsibilities for third party distribution

- Manage/coordinate preparation for product introduction meetings including attendance of appropriate GSAM personnel and production of presentation decks
- Manage/coordinate preparation for subsequent meetings, site visits, requests for information, periodic communications
- Manage and respond to platform due diligence analysts, CIO's and strategists inquiries and quarterly questionnaires
- Market complex industry investment themes and analysis to clients
- Effectively partner/communicate and strategize with Strategic and Key Account Relationship Managers in client efforts
- 3 to 5+ years of financial sales or due diligence experience
- CFA or working towards a CFA a plus
- Develop strong knowledge of the retail distribution market including mutual fund share class options, SMA, 'model' delivery/UMA, along with legal and regulatory issues
- Manage the follow up initiatives post conference call/meeting, inclusive of goal setting, reporting and tracking progress
- Work alongside the Insurance Solutions team to strategically position new strategies for clients and prospects

Qualifications for third party distribution

- Motivated self-starter who is outgoing, resourceful, with strong work ethic,

- Knowledge of various fundamental and quantitative investment strategies including fixed income & currency, equity, and alternatives
- Excellent interpersonal skills and ability to work efficiently within a team environment
- Strong and persuasive presentation and communication skills organizational skills
- Appropriate academic credentials including graduate degree
- Working knowledge of Morningstar Direct would be advantageous