Managers
INVESTMENT GROUP

JOB TITLE: Regional Manager – Broker Dealer Segment (All outside Sales)

Reports to: Director of National Sales
Classification: Exempt
Level: Vice President

Department: National Sales
Division: BD Sales
Location: Texas (Houston/Dallas)

Managers Investment Group offers institutional-quality investment strategies across most asset classes, using some of the finest investment firms from around the world. We offer these strategies as single-asset-class components as well as complete investment solutions. Our wide range of mutual fund and separate account strategies are primarily sold to financial intermediaries across the U.S.

JOB SUMMARY:
The Regional Manager is responsible for new business development and client service through the broker/consultant channels within the specific geographic market within which they live.

ESSENTIAL FUNCTIONS:
- Develops annual business plan and devises the necessary activity strategies, tactics and resources in order to achieve those goals and grow the assigned territory.
- Develops, builds and maintains relationships with key brokers, consultants and clients within focus list of sponsor firms within home territory.
- Meets with advisors, brokers and consultants in the assigned territory and educates them on SMA and Fund product lines
- Tracks all meetings and sales events through CRM system.
- Develops and maintains a professional sales presentation which can be adapted to a variety of audiences.
- Performs new business and client review presentations.
- Interacts with research staff to coordinate client service efforts.
- Solid understanding of mutual fund advisory programs and UMA/SMA platforms in the broker dealer segment
- Keeps abreast of the current economy, Client Portfolios, performance and future outlook.

ADDITIONAL RESPONSIBILITIES:
- Educates and mentors internal client service associate.
- Provides feedback from the field to appropriate individuals within the firm in order to enhance service and deliver a superior product.
- Develops and shares value added pieces for use in the field.
- Cross-pollinates ideas and sales leads across territories as well as across departments.

KNOWLEDGE, SKILLS AND ABILITIES:
- Knowledge of the Investment Management Industry and key portfolio management concepts.
- Understanding of separately managed accounts
- Prioritizes, plans and takes initiative.

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- Relies on experience to make good decisions and to enhance problem-solving skills.
- Communicates effectively and persuasively with colleagues, clients and brokers.

- Excels in a fast-paced environment while meeting deadlines and executing responsibilities with minimal errors.
- Promotes a team environment.
- Supports and upholds Firm values and treats others with respect and consideration.
- Acts as a role model and resource for junior employees and offers guidance.

EDUCATION AND EXPERIENCE:
- Bachelor's preferably in marketing or a finance-related major.
- Five plus years in the investment management industry.
- Past experience selling and servicing mutual funds and separately managed accounts in this specific territory and channel
- CFA, CIMA or CFP desirable.
- Required to obtain Series 6 and 65 if not already licensed.
- Valid driver's license.

INDEPENDENT ACTION:
Duties are performed independently, consulting with Managing Partner or Director of National Sales as needed.

DIRECT REPORTS:
Assists in the training and mentoring of the Investment Services Associates and acts as a resource for their knowledge and development.

PHYSICAL REQUIREMENTS:
- Extensive overtime may be necessary.
- Excellent written and verbal communication skills.
- Maintains a professional appearance and demeanor.

DATE: 7/2010