

# WASATCH GLOBAL ADVISORS

## JOB DESCRIPTION

**DEPARTMENT:** Marketing  
**WORKING TITLE:** Vice President, Institutional Sales  
**EXEMPT/NON EXEMPT:** Exempt

### REPORTING RELATIONSHIPS

**REPORTS TO:** Director, Institutional Distribution  
**COORDINATES WITH:** Sales and Client Relations Team  
**SUPERVISES:** NA

### INTRODUCTION

Wasatch Global Advisors is searching for a Vice President, Institutional Business Development. The sales professional will be responsible for the successful creation of new business development in the Western U.S. region. The role will be responsible for identifying and developing relationships with professional fund buyers including institutional consultants, single family offices, wirehouses, E&Fs, pension funds, insurance companies, and OCIO's in Western half of the US.

It is preferable that this position be based in Salt Lake City and it requires significant domestic travel.

### JOB FUNCTIONS

- Develop and execute business plans resulting in increased assets, revenue and market share.
- Identify and maintain strategic key relationships with gatekeepers, consultant research teams, client consultants and plan sponsors.
- Be a proactive, sales-driven representative in the pursuit of additional business.
- Manage due diligence process with consultants and plan sponsors in collaboration with the appropriate portfolio management and research team members.
- Increase the flow of due diligence questionnaires, RFP and other research-oriented activities.
- Sustain sound knowledge of strategies in order to educate clients and sponsor firms on the various types, performance and introduction of Wasatch products.
- Coordinate efforts internally with sales, marketing and product to meet sales and placement targets.
- Ensuring that product and sales materials are always updated and focused for the applicable presentation, conference, or opportunity.
- Work in a collaborative manner with other sales and client relations team members.

### MINIMUM QUALIFICATIONS

#### **Education and Experience:**

- Bachelor's degree in business from an accredited university or college.
- 5 - 10 years of experience in Asset Management, a minimum of 5 years of sales experience.
- Must have flexibility to travel at least 50%
- Series 6, 63, 66 required

#### **Prefer the following demonstrated knowledge, skills, and abilities:**

- Established book of business.
- Strong analytical skills.
- Proven track record of problem solving; strong problem recognition and resolution skills.
- Excellent presentation/communication skills (verbal and written).
- Ability to establish strong relationships with clients; client service orientation.

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- Ability to successfully work within a team and independently.
- Excellent attention to detail while working through tight timelines.
- Results driven.
- Strong work ethic and professional demeanor.
- Ability to prioritize, organize and manage multiple tasks in a professional, fast-paced environment.
- Knowledge of enterprise/strategic planning and presentation.
- Microsoft Office Suite (Outlook, Word, PowerPoint, Excel).

### PREFERRED QUALIFICATIONS

- Master's degree and/or Chartered Financial Analyst (CFA) strongly preferred.
- Experience selling long only equity portfolios
- Strong relationships with institutional investors and/or consulting firms

*This job description is intended only to describe the general nature of the position and does not constitute an all-inclusive list of duties, nor of the knowledge, skills, and abilities required to perform the job.*