



STANSBERRY ASSET MANAGEMENT

## **JOB DESCRIPTION – Client Relationship Manager (CRM I)**

Qualified candidates can apply at [tom.vatavuk@stansberryam.com](mailto:tom.vatavuk@stansberryam.com)

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### **General:**

With Offices in NY and CA, Stansberry Asset Management (“SAM”) currently manages over \$700M in assets. SAM is a rapidly growing Registered Investment Advisor with a highly motivated team of investment professionals. We love what we do and are passionate about helping clients and their families achieve their long-term investment goals.

Our firm is undergoing a significant expansion and we are seeking a highly motivated junior-level Client Relationship Manager (CRM I) to work on a team with an experienced Client Relationship Manager. The CRM I will have a book of clients assigned to them and take ownership of all aspects of their clients’ experience, ensuring exceptional service and ongoing support. Although the CRM I will act as the primary contact for all client inquiries, their main objective is to retain assets. CRMs are also incentivized to grow client AUM through additions and referrals. As a CRM I you will need to possess fundamental investment knowledge, and strong interpersonal/communications skills.

This role requires direct, daily interaction, with our clients and operations team. You will also interact with the client service department head, investment committee, sales, and fellow client relationship managers. You should be comfortable working in a hybrid/remote team-based environment and conducting business over the phone, in person, and virtually.

### **Essential Functions (Responsibilities):**

- Building relationships with clients by acting as their primary point of contact for all inbound inquiries
- Retaining existing clients and cultivating additional business from existing client base
- Proactively reaching out to clients for portfolio reviews/update calls, and to invite them to in-person events
- Helping clients understand SAM’s investment philosophy, market outlook, and investment strategies
- Assisting clients in accessing/navigating both the SAM and Pershing client portals
- Answering questions related to clients’ accounts, including account activity, trade rationale, and asset allocation
- Acting as a liaison between the client, our investment committee, and the operations team
- Logging client call notes, emails, and operational requests into Salesforce
- Staying current on economic/market events and our investment committee’s outlook
- Maintaining general knowledge of Stansberry Research’s products offerings, recommendations, and points of view

### **Qualifications/Requirements:**

- Client service/sales experience working with high net-worth individual investors
- Client centric mindset with a desire to help individual investors and their families
- Experience working in virtual/remote cross functional teams
- Bachelor’s Degree from an accredited college or university
- Series 65 license, or willingness to obtain within first 90 days of employment

**Desired:**

- Experience with Salesforce, Orion Advisors, NetXInvestor
- CFP Designation