



STANSBERRY ASSET MANAGEMENT

JOB DESCRIPTION – Sales Development Representative

Qualified candidates can apply at trent.sadler@stansberryam.com

General:

Stansberry Asset Management is looking for a suitable candidate to assume the position of Sales Development Representative (SDR). The firm is experiencing significant growth and plans to continue this trend by building out our sales team with qualified candidates. The role is accomplished through direct, daily interactions with prospective investors within our database. The SDR will ensure that we are consistently engaging with, marketing to, and qualifying potential SAM clients. This position requires building investment knowledge, fundamental concepts in professional organizations, personal effectiveness, and great communication. The Sales Development Representative will be working in a team environment with the majority of daily activity being assigned by the Account Executive.

Essential Functions (Responsibilities):

- Prospect contact and outreach - Act as a primary point of contact to prospects within our database
- Understand all the products & services offered by SAM and be able to communicate them succinctly and effectively
- Support Account Executives and Outside Representatives in setting up qualified in-person and over-the-phone meetings
- Communicate and follow up on prospect issues in a timely manner – complete assigned workflow tasks with minimal backlog
- Contribute to keeping the sales pipeline full
- Organization – help team members in assessing and implementing necessary technology solutions and process changes
- Team Knowledge - stay current with industry standards, market updates, and information coming directly from the Stansberry Research Investment Newsletter
- This role can be located in San Mateo, CA, New York City, or remote options available

Qualifications/Requirements:

- Associate or bachelor's degree, ideally with a focus in Business, Finance, Accounting, or Marketing
- 0-3 Years work experience in the financial industry, sales experience a plus
- Passion for the investment industry
- Excellent computer skills (MS Word, MS Excel, Adobe, Salesforce, Docusign)
- Demonstrated ability to work cross functionally in teams
- Interpersonal and customer service skills
- Excellent written and verbal communication skills, especially over the phone
- Must be dependable, trustworthy and punctual
- Attention to detail, self-directed work, and high level of organization is a must