SAM

Stansberry Asset Management

JOB DESCRIPTION – Senior Client Relationship Manager (Sr. CRM)

Qualified candidates can apply at tom.vatavuk@stansberryam.com

---

General:

With Offices in NY and CA, Stansberry Asset Management ("SAM") currently manages over $700M in client 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 families achieve their long-term investment goals.

Our firm is undergoing a significant expansion and we are seeking a highly motivated Senior Client Relationship Manager ("Sr. CRM") to work with our larger/more complex client relationships. The Sr. CRM 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. As a Sr. CRM, you will eventually be expected to lead and develop your own client service team.

Although the Sr. CRM will act as the primary point of contact for all client inquiries, their main objective is to retain assets. Sr. CRMs are also incentivized to organically grow client AUM through additions and referrals. In this role you will need to possess solid investment/wealth management knowledge, strong interpersonal/communications skills, and experience coaching/mentoring junior team members. 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 inquires
- 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 topics like 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 CRM
- 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
- Coaching and ongoing development of your CRM team

Qualifications/Requirements:

- 10+ years of 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
- Experience leading, mentoring/coaching a team
- 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 or willingness to obtain in the future