

Manager, Strategic Accounts

Geographic Focus: East Coast - Philadelphia, New York, Washington D.C.

## Introduction to Zenith

Zenith Wealth Partners (Zenith) is a fee-only investment management and financial planning firm on a mission to combat racial, age based, and gender wealth inequality by delivering comprehensive, high quality, and accessible advice to individuals and organizations. We believe that wealth management does not begin only when a client has accumulated significant wealth. Managing and achieving wealth is an infinite journey. Zenith works together with its clients to evaluate the best financial decisions while giving them back time and peace of mind.

## Position Summary

Zenith Wealth Partners is creating a new role to help drive the firm's end-to-end business development efforts. Interested candidates will be extraordinary communicators that are highly motivated to help Zenith engage new individual and institutional clients. This role will be based on the East Coast with periodic travel to Zenith's central office in Philadelphia. Occasionally, the role may require in-person meetings or engagements with client prospects. As a key member of the firm, this individual will be responsible for:

- Generate mission-aligned business opportunities by cultivating new leads, qualifying prospects, and closing new contracts. To start, this work will cover all of Zenith's service offerings and could become more specialized based on a candidate's interest and the firm's needs.
  - Identify institutional partners with endowments, foundations, quasi-endowments, or operating reserves that need active investment management.
  - Source and cultivate RIAs in need of Zenith's outsourced investment advisory service offering and/or a more integrated partnership (i.e. equity investments, acquisitions, etc.).
  - Source new public RFPs or contract opportunities and lead on proposal development.
- Find regional and national employers interested in Zenith's financial education offerings and serve as relationship liaison for the Financial Planning team.
- Employ a consultative sales approach built on trust and credibility.
- Maintain up to date records in Zenith's CRM, including call campaigns, events, meetings, etc.
- Master Zenith's value proposition to properly communicate and sell services to interested parties.
- Execute a go-to-market strategy and inform future iterations based on client feedback.
- Create a vision and staffing plan for a high-functioning business development team that can scale alongside the firm.
- Collaborate with the Marketing team to help build brand visibility and awareness - representative activities include co-hosting events, informing the design of prospect collateral, and updating Zenith's brand positioning.

This role has tremendous growth potential and is an ideal fit for an early-career professional with aspirations to build a sales career within financial services. The role sits at the intersection of all of Zenith's service offerings and will need to be highly collaborative.

## Desired Knowledge & Skills

- 3-7 years of demonstrated sales experience (outbound calling experience preferred)
- Bachelors' degree from an accredited institution
- Series 7 and 66 or Series 65 preferred
- Proven track record setting and achieving sales goals and initiating new relationships
- Self-Starter - You thrive in an environment where you drive your own results
- Creative - You enjoy brainstorming new approaches to problems or opportunities
- Time Management - You excel in prioritizing work and focusing on the highest value tasks
- Resilient - You are persistent in achieving goals and face challenging sales scenarios head-on

- Competitive - You embrace a goal-oriented culture and always strive to put your best foot forward

### **Compensation & Perks**

Zenith embraces a high-performance culture and seeks to reward employees that deliver exemplary results. The position will earn an \$80,000 base salary. The role will also earn quarterly commissions, calculated on a revenue-share model, with a target total cash compensation range of \$120,000 - \$160,000 and no cap.

To deliver your best performance, we believe it is critical that you invest in self-care. Company benefits include (20) days paid time off, one day off to celebrate your birthday, and an additional (10) holidays observed by the NYSE. Additionally, employees will have access to health benefits (e.g., medical and dental insurance).

Additionally, Zenith prides itself on being a supportive workplace dedicated to employees' personal and professional growth. Zenith will reimburse employees for up to \$1,000 for employees to engage in continuing education. Zenith will provide you with a company-owned laptop (Apple or Lenovo) for your work.

Zenith provides equal employment opportunities (EEO) to all employees and applicants for employment without regard to race, color, religion, sex, national origin, age, disability or genetics. In addition to federal law requirements, Zenith complies with applicable state and local laws governing nondiscrimination in employment in every location in which the company has facilities. This policy applies to all terms and conditions of employment, including recruiting, hiring, placement, promotion, termination, layoff, recall, transfer, leaves of absence, compensation and training.

Pre-employment background checks will be conducted for candidates offered employment.

### **Next Steps**

We would love to hear from you and will be collecting candidate materials on a rolling basis. Please use the Apply Now button on the Careers page of our website to submit your cover letter, resume, and preferred contact information.