Director of Strategic Accounts

Weitz | INVESTMENT MANAGEMENT

Reports to Vice President and Head of Sales
Location: Remote Position

The primary responsibility of the Director of Strategic Accounts will be to facilitate and develop the corporate relationship between Weitz Investment Management and a subset of the firm's largest strategic partners including Custodians, TAMPS, IBDs, Regional Firms and select RIAs. This role will be responsible for expanding distribution, increasing assets, driving sales, and garnering and retaining product visibility while growing market share and firm rank. The role will require the individual to develop relationships with gatekeepers and key decision makers throughout the partner firm's organization and with select RIAs.

Essential Functions

- Develop a meaningful professional relationship with each focus firm, including executive leadership, due diligence teams, sales management, field specialists, sales desks, product/program managers and others to increase overall sales and visibility of Weitz Investment Management
- Gain access to gatekeepers, win mandates and research endorsements such as model placement and recommended lists
- Understand and effectively communicate Weitz's offerings and distribution capabilities
- Represent Weitz in a public speaking capacity with our top accounts and at select industry events
- Work with Weitz's sales management to develop and implement a holistic strategy for strategic partner firms that integrates marketing, sales activity, center of influence focus to increase company sales, market share and retention
- Develop a business plan for key relationships
- Ensure hybrid sales team is fully informed on client initiatives and promote sales activities
- Evaluate business opportunities and utilize internal resources effectively to manage contract negotiations and financial terms between Weitz and partner firms
- Profile and understand client and prospect business models, identify gaps and effectively position Weitz investment solutions
- Engage clients in dialogue about their business models and appropriate investment strategies
- Identify and proactively addresses potential investment concerns of existing clients
- Manage travel, budget and expense accounts efficiently and effectively
- Maintain activity in CRM accurately and effectively
- Use internal and external database, systems and resources to identify and screen potential prospects

Requirements

- Bachelor's degree
- CFA, CFP, CIMA and/or MBA preferred
- Minimum of 8-10 years' experience in the investment management industry, previous experience in client relationship management and sales required
- FINRA Series 7, 65/66, 63 licenses required
- Ability to engage in significant travel is required (60%+ for client meetings and industry events)
- Proven success selling to home office research teams, Bank Trusts or Private Banks and RIAs
- Demonstrated comfort engaging directly with clients and prospects with the ability to influence their decisions while articulating ideas/strategies clearly
- Self-starter, strong work ethic
- Enjoy working collaboratively across the organization in a team environment, interacting with all departments
- Excellent time management, multi-tasking and organizational skills
- Clear commitment to the Weitz culture, values and approach working with clients/prospects
- Advanced proficiency in MS Office and/or CRM databases (such as Salesforce)

Please apply by submitting resume to Kelly Kraft, Vice President and Head of Sales, by e-mail at careers@weitzinvestments.com.

About Weitz Investment Management

Founded by value investor Wally Weitz in 1983, Weitz Investment Management, Inc. is a boutique, employee-owned asset management firm headquartered in Omaha, Nebraska. Over the past three decades, Weitz has leveraged its research-driven approach to capitalize on opportunities that arise out of market inefficiencies. Decisions are backed by thorough research, logical strategies, extensive debate and our team's personal commitment to long-term results. The Weitz team builds and manages concentrated, high-conviction, actively managed portfolios. Through bottom-up, proprietary research that emphasizes fundamentals, we focus on creating positive results over the long term. We offer a variety of options for investors with different goals and preferences, including equity and fixed income investment strategies.

We offer all employees excellent benefits including health care coverage and a qualified profit sharing plan. We also have an employee stock purchase plan. Compensation includes salary and bonus and will be commensurate with experience.