

# Hybrid Wholesaler/Relationship Manager

Reports to Vice President and Head of Sales

Location: Omaha, Nebraska

Reporting to the Vice President and Head of Sales, the Relationship Manager is a hybrid (internal support/external wholesaling) role responsible for driving sales by proactively marketing Weitz Investment Management products and services to assigned region(s). The Relationship Manager develops new business leads and cultivates existing relationships, demonstrating excellent problem solving and sales skills to promote the growth of the Firm's strategies and mutual funds.

## Essential Functions

- Creates and implements business plan to maximize growth and meet sales and activity goals for the defined region(s)
- Proactively develops new business and maintains existing business relationships by conducting conference calls, face-to-face meetings and web-based sales meetings
- Reaches out to current and prospective advisers within market to increase sales and market share
- Demonstrates thorough knowledge of the industry and the Weitz products and services
- Effectively use industry and product knowledge to illustrate and position the Weitz solutions in an innovative way
- Assists advisors in identifying sales opportunities and regularly updates advisors on industry trends
- Stays current on all economic and market conditions, to effectively make recommendations to advisors for marketing the Weitz products and services to clients
- Maintain and update CRM proactively to ensure accurate and complete records
- Other duties as assigned based on company needs

## Requirements

- Bachelor's degree in business or related field, or equivalent education/experience
- Minimum 2 years of sales experience in a hybrid or external wholesaling role
- Demonstrated experience conducting meetings and the ability to form relationships with financial advisors in a virtual setting
- Proven success growing a region within the financial service industry as measured by sales results
- Ability to build productive relationships; provide training and sales ideas
- Proven sales acumen and presentation skills
- Ability to balance multiple priorities and meet specific marketing/production objectives
- Motivated, self-starter
- Ability to work collaboratively and effectively
- Series 6 or 7 and 63 licenses required
- 50% travel required

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