

Reports to: Vice President, Director of Intermediary Distribution

Location: Omaha, NE

Reporting to the Vice President, Director of Intermediary Distribution, the Regional Consultant (internal wholesaler) is a consultative sales role responsible for partnering with the Regional Director (external wholesaler) to build and maintain financial advisor relationships by delivering value to their businesses through exceptional communication, problem-solving skills, and product solutions. This individual will demonstrate strong knowledge of the financial industry, investment trends, and Weitz Investment Management's (WIM) product offering.

This role is based in Omaha, NE. WIM offers a hybrid work environment (2-days remote/ 3-days onsite).

Essential Functions

- Work with Regional Director to develop and execute a territory business plan to grow sales, market share and increase visibility.
- Develop a strong command of WIM's products and investment process.
- Utilize industry knowledge, personal relationships, and WIM's proprietary Business Intelligence tools to prioritize activity and develop and grow existing and new relationships.
- Effectively profile advisors to understand their practice, clients, and investment process to better serve their needs and strategically position WIM products.
- Handle daily territory management tasks to ensure maximum business efficiency, including updating and maintaining WIM's CRM system with all activities and communications.
- Conduct virtual sales meetings/presentations with financial advisors to discuss the benefits of WIM's products, including key differentiators and competitive positioning.
- Provide high quality service to financial advisors to ensure growth and retention of assets and clients.
- Collaborate with business partners in marketing and business intelligence to enhance tools, processes and resources.
- Stay up to date on economic and market conditions to effectively support advisors, identify opportunities and respond to inquiries.
- Ensures compliance with internal policies and procedures as well as all regulatory requirements.
- Occasionally travel to the territory to participate with the Regional Director for dinners, conferences, and meetings.
- 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 experience in financial services industry
- Excellent interpersonal skills and the ability to work collaboratively and effectively
- Ability to balance multiple priorities and meet specific territory goals
- Motivated, self-starter
- Ability to work collaboratively and effectively
- Series 6 or 7 and 63 licenses required

Effective January 1, 2022, all successful applicants for positions with Weitz Investments must be fully vaccinated against COVID-19 as a condition of new and continued employment and provide proof of current vaccination status prior to commencement of employment, unless legally entitled to a reasonable accommodation related to a religious or medical exemption. Evidence of receipt of subsequent booster doses may be required of applicants and throughout employment at Weitz Investments' discretion, and/or if recommended by the CDC.

Please apply by submitting resume to Kelly Kraft, Vice President, Director of Intermediary Distribution, 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.

Weitz Investments is an equal opportunity employer. We desire to foster a culture of inclusion that we believe drives better outcomes for our clients, colleagues, and community. We evaluate qualified applicants without regard to any protected attribute, including race, religion, color, national origin, gender, sexual orientation, gender identity, gender expression, age, marital or veteran status, pregnancy or disability, or any other basis protected under applicable law. In accordance with applicable law, we make reasonable accommodations for applicants' and employees' religious practices and beliefs, as well as any mental health or physical disability needs.