## Summary

The Associate works closely with senior sales professionals and relationship managers, providing day to day support in their sales and relationship management goals. Associates have a comprehensive knowledge of their teams' assigned territory business plans, client service plans and marketing campaigns. Associates are product generalists as they may support sales teams specializing in assets classes or teams that are product generalists.

The primary purpose of the role is to provide sales and relationship management support. Individuals in this position will also engage in intermittent travel to covered territory and may have direct responsibility for a subset of the client base with typical focus on smaller clients with straightforward service needs. In addition to territory coverage, travel and attendance at industry conferences, they will occasionally provide coverage for clients in other regions as a back-up.

## Responsibilities

- Partner with designated senior sales and relationship managers by providing follow-up and sales/relationship management support.
- Coordinate targeted outreach campaigns to clients and prospects.
- Assist in sales and cross selling initiatives and transactions with senior managers.
- Review industry publications such as iiSearches and FundFire on a daily basis to stay informed on industry trends and opportunities.
- Proficiently utilize applications such as Sales Force, eVestment Alliance, MMD and Preqin for meeting preparation, activity & pipeline capture, to run competitive analysis of products.
- Responsible for some smaller relationships with straightforward service needs with a focus on asset retention.
- Responsible for effectively partnering with colleagues across channels and affiliate investment firms to promote one Team value system and serve shared clients effectively.
- Contributes to overall Institutional team with sales and client service ideas, best practices and learned industry knowledge.
- Responsible for a core competence of Nuveen products and the Nuveen story.
- Coordinate or participate in special projects as assigned.

## Qualifications - Internal

Required
- Bachelor's Degree; FINRA Series 7, 63 required (or need to be obtained)
- Minimum of three years of financial services industry experience. Minimum of 1 year in a relationship management or sales support capacity with a Financial Services firm.
- Strong financial services business acumen and experience required. Specifically this associate must have an understanding of the Institutional marketplace, understanding of the Nuveen products, organizational goals and structure.

Desired
- 5 years of financial services industry experience, with background in the institutional marketplace.
- Interest in pursuing MBA, CFA, or CAIA.
- Background in institutional sales or relationship management preferred.
- Strong communication and presentation skills.
- Flexible and highly adaptable.
- Able to work multiple projects simultaneously.
- Technologically proficient and knowledgeable.

If interested, please contact:

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