Segall Bryant & Hamill is an independent investment firm based in Chicago, Illinois with offices in Denver, CO; St. Louis, MO; Philadelphia, PA; and Naples, FL. Since our founding in 1994, we have grown to approximately $20.0 billion in assets under management as of September 30, 2019. We provide fee-based investment management of equity, fixed income, alternative and asset allocation portfolios. Our growing client list includes high net worth individuals and families, endowments, foundations, corporations, hospitals, public funds and multi-employer plans across the country.

Segall Bryant and Hamill is an equal opportunity employer and all qualified applicants will receive consideration for employment without regard to race, religion, sex, gender, sexual orientation, gender identity, national origin, disability status, protected veteran status, or any other characteristic protected by law.

Job Title: Hybrid Advisor Consultant
Category: Advisor Solutions
Employment Type: Full Time
Location: Chicago, IL
Compensation: commensurate with experience

Segall Bryant & Hamill (SBH) seeks a Hybrid Advisor Consultant to join our team. The Hybrid Advisor Consultant, in partnership with a Director of Sales, will be responsible for building long-term partnerships with intermediary clients (Financial Advisors, RIAs, banks and home offices) that maximize long-term holdings of Segall Bryant & Hamill investment solutions including mutual funds and separately managed accounts.

GENERAL RESPONSIBILITIES

- Develop client relationships, including expanding existing client relationships and developing new profitable relationships
- Conduct consultative, relationship-building sales calls with financial consultant
- Partner with a Director of Sales to develop and implement a territory sales plan
- Approach interactions with a consultative mindset, starting with client needs and effectively leveraging internal resources needed to meet those needs, including delivering insight-based education, coaching and portfolio construction consultations
- Develop and execute on a data driven client segmentation, including the consistent profiling of clients, timely and accurate recording of all client/prospect interactions into the firm's CRM system and prospecting for new potential relationships
- Handle daily territory management tasks to ensure maximum business efficiency and effective resource allocation across service offerings and firms
- Travel as needed within territory to conduct meetings with clients, assist with client events, and attend industry conferences

QUALIFICATIONS

- Bachelor's degree in a business-related major is preferred
- 2-5 years of sales experience in financial services preferred
- A current understanding of capital markets, mutual funds and separately managed accounts
- FINRA Series 7 and 63 required
- Consultative, client first approach, delivering solutions, not products, to meet client needs and drive results
- Ability to develop client relationships and strategic partnerships
- Proficient in Microsoft Office products, CRM workflow ie. Salesforce is a plus

Apply via the SBH Career Center

Apply to: Hybrid Advisor Consultant

All submissions must include a resume, cover letter and salary expectation
Company website: www.sbhic.com