

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:** Senior RFP and Database Associate, Team Lead

**Category:** Marketing

**Employment Type:** Full Time

**Location:** Chicago

**Compensation:** commensurate with experience

Segall Bryant & Hamill (SBH) seeks a Senior RFP and Database Associate to join our team. The qualified candidate will be responsible for developing, coordinating and completing written proposals (such as responses to request for proposals (RFPs), request for information (RFIs) and consultant and due diligence questionnaires) primarily for the firm's institutional and advisor solutions channels. This position ensures that top-quality proposals are prepared accurately, positioned effectively and delivered on time; he/she serves as the writer/editor responsible for developing proposal content and/or maintaining the quality of existing content. This position will also be responsible for running and analyzing competitive information using various tools and software systems.

This person also functions as the team lead, responsible for allocating work across the team and overseeing all proposals and requests, to ensure timely delivery of high quality, accurate submissions. He/she also works closely with the current RFP and Database associate, located in Chicago. This position reports to SBH's Director of Marketing, located in Denver.

### **GENERAL RESPONSIBILITIES**

- Ensure timely and accurate delivery of professional, competitive, sales-oriented proposals according to stringent deadlines; successfully manage multiple deadline-driven projects concurrently.
  - Analyze RFP, RFI and RFQ requirements.
  - Research and write concise, compliant, persuasive responses to RFP requirements.
  - Apply formal editing skills to RFP responses to ensure answers are complete and grammatically correct.
  - Interpret, analyze and break down firm AUM and strategy level data for RFPs and other marketing collateral.
- In team lead role, be responsible for allocating work within team (which consists of this position and another associate); oversee all requests and project schedules to ensure they are met on timely and accurate basis.
  - Look for opportunities to improve processes, leverage technology and put in place best practices to deliver accurate, high impact RFPs in a timely fashion.
- Responsible for running, analyzing and interpreting competitive information using various tools and software systems, including eVestment and Morningstar Direct, among others.
- Manage and continually update RFP content database (RocketDocs), working with other associate on team.
- Manage third-party vendor, which is responsible for populating content and data in consultant databases.
- Manage and monitor new business pipeline of sales team using Salesforce.
- Assist the marketing and sales teams with special projects as time permits.

### **QUALIFICATIONS**

- Bachelor's Degree in Business, Finance, Communications, Marketing, or related field preferred.
- Minimum of four years of experience writing proposals or other types of formal documents within asset management industry.
  - Experience as Proposal Manager or Proposal Writer a plus.

- Experience with database fulfillment.
- Highly detail-oriented with exceptional organizational and time management skills.
- Ability to work in a fast-paced environment with quickly changing priorities and tight deadlines, while maintaining a high degree of professionalism and focus.
- Strong understanding of investment data; comfortable working with large amounts of data.
- Strong writing, editing and proofreading skills; strong oral communication skills.
- Technologically savvy; ability to quickly learn various types of software systems.
- Strong proficiency in MS Office specifically Word and Excel, experience with eVestment, Morningstar Direct and RFP content database (such as RocketDocs) strongly preferred.
- Ability to work independently and within a collaborative team environment
- The successful candidate will be proactive, a self-starter with a strong work ethic; must possess the ability to prioritize workflow and to communicate effectively and constructively within a team, the department and the firm.

Apply via the [SBH Career Center](#)

Apply to: [RFP and Database Associate, Team Lead](#)

All submissions must include a resume, cover letter and salary expectation

Company website: [www.sbhic.com](http://www.sbhic.com)

