

COHEN & STEERS

Job Title: Senior Vice President, Institutional Sales Executive

Department: Institutional Sales

FLSA Code: Exempt

Job Reports To: Senior Vice President, Head of North America Institutional Business Development & Consultant Relations

Firm Overview:

Cohen & Steers is a leading global investment manager specializing in liquid real assets including real estate securities, listed infrastructure, commodities, and natural resource equities, as well as preferred securities and other income solutions. The firm has focused on these asset classes as they can provide attractive long-term returns with meaningful income, access to tangible, hard assets with the added benefit of liquidity, and low correlations to broad equity and bond markets. Founded in 1986, the firm is headquartered in New York City, with offices in London, Dublin, Hong Kong and Tokyo. As of March 31, 2021, the firm managed approximately \$87 billion in assets for institutional and individual investors around the world.

Firm at a glance



Our firm

Founded in: **1986**
Public Since: **2004**
NYSE: **CNS**

Dedicated to the pursuit of excellence in everything we do, Cohen & Steers is a leading global investment manager specializing in real assets and alternative income, focused on delivering attractive returns, income and diversification.

Named Among "Best Places to Work in Money Management"



Our people

300+ employees
in **5** cities
across **3** continents

NEW YORK • LONDON • DUBLIN • HONG KONG • TOKYO

50%+ insider ownership
60+ years investment professionals

Senior Investment Professionals

20+ years average experience
12+ years average tenure



Our assets

\$87.0Bn Assets under management

\$58.6B Listed Real Assets
\$22.4B Alternative Income
\$5.8B Multi-Strategy



Our strategies

- Real Estate Securities
- Preferred Securities
- Listed Infrastructure & MLPs
- Multi-Strategy Solutions
- Natural Resource Equities
- Commodities
- Closed-End Fund Opportunities

At March 31, 2021. Source: Cohen & Steers and Morningstar.

Strategy assets may not sum to total firm assets due to rounding. Asset breakdown varies from the firm's financial reporting as the firm's financial reporting does not break out multi-strategy portfolios as distinct strategies; the assets in these portfolios are either included in "Other" or with the underlying asset classes of the sleeves for financial reporting purposes (e.g., allocations to U.S. Real Estate in the real estate multi-strategy portfolios are included in the U.S. Real Estate asset category). May 26, 2020. Dublin office and the establishment of Cohen & Steers Ireland Limited ("CSIL"), Pensions & Investments partnered with Best Companies Group, a research firm specializing in identifying great places to work, to conduct a two-part survey process of employers and their employees. The first part consisted of evaluating each nominated company's workplace policies, practices, philosophy, systems and demographics. This part of the process was worth approximately 25% of the total evaluation. The second part consisted of an employee survey to measure the employee experience. This part of the process was worth approximately 75% of the total evaluation. The combined scores determined the top companies. For a complete list of the 2020 Pensions & Investments' Best Places to Work in Money Management winners and write-ups, go to www.ponline.com/BPTW2020.

Strategy breakdown

Asset breakdown

Listed Real Assets	\$58.6
U.S. Real Estate Securities	\$34.6
Global/Non-U.S. Real Estate Securities	\$16.4
Global Listed Infrastructure & MLPs	\$7.6
Alternative Income Solutions	\$22.4
Preferred and Income Securities	\$22.4
Multi-Strategy Solutions	\$5.8
Real Assets Multi-Strategy	\$1.5
Other Multi-Strategy Solutions ⁽¹⁾	\$4.3
Other Portfolios⁽²⁾	\$0.2

Account types

Advisory	\$20.3
Sub-Advisory	\$16.3
Open-End Funds	\$38.6
Closed-End Funds	\$11.9



As of March 31, 2021. Source: Cohen & Steers.

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⁽¹⁾ Includes Real Estate Multi-Strategy portfolios, an alternative income open-end fund, a REIT and Preferred and Income closed-end fund, fund of closed-end funds portfolios and a thematic multi-strategy portfolio.

⁽²⁾ Includes several legacy and custom portfolios.

Summary:

The Institutional Sales Executive will actively develop new client relationships across North America's West territory, with a explicit focus on new client acquisition across all Institutional market channels (public funds, corporate, E&F, Taft Hartley, insurance, etc...). The Institutional Sales Executive role is a critical strategic position for Cohen & Steers and will further advance the firm's presence as a leading provider of sophisticated global investment solutions.

Major Responsibilities/Activities:

As a member of the Institutional Sales team, the primary responsibility of the Institutional Sales Executive is to initiate and close new business for Cohen & Steers' investment strategies. This involves coordination of sales and marketing efforts, strategic innovation and communication, sales process management, and collaboration with other members of the organization to meet assigned sales goals and firm-wide investment product and strategy initiatives.

The successful candidate must have a quantifiable track record of building relationships with and selling to a breadth of institutional asset owners, with a focus towards the largest plans on the Pensions & Investments 600. Additionally, the ideal candidate will have established relationships with influential field consultants in the territory. The ability to technically engage senior level investment staff, CIO, CFO and Trustee decision-making levels is a requirement of the position. Experience and a demonstrated track record of successfully selling real estate and other real assets through listed and/or private offerings would be beneficial.

This role will work closely with the firm's existing team of distribution and dedicated consultant relations professionals, as well as with the firm's senior investment professionals, portfolio specialists, client service team and channel marketing partners. The Institutional Sales Executive will construct and execute a strategic territory sales plan, and enthusiastically communicate the firm's strategic vision, to attract

assets from institutional investors across the West territory. This role will play a vital role working with investors to identify custom solutions and in creating a more proactive presence and competitive edge for Cohen & Steers. Finally, the candidate must have strong interpersonal skills and a team orientation, an entrepreneurial and collegial approach to business development, be committed to excellence, and have the personal presence and demeanor to represent Cohen & Steers with distinction.

Sales Responsibilities:

- Develop and communicate a strategic business plan for the territory.
- Exhibit an intense and tenacious level of activity to source new leads.
- Conduct face-to-face, virtual and telephonic meetings with prospective clients.
- Effectively use technology to source and engage with prospects and field consultants.
- Identify and close new institutional relationships and mandates for Cohen & Steers.
- Meet identified sales targets for new asset acquisition.
- Develop long term relationships to drive ongoing business development opportunities in the West territory.
- Deliver investor feedback to marketing and product development teams and actively contribute to new product ideas.
- Successfully, and with enthusiasm, execute and build on the institutional sales strategy to drive the marked growth of the firm's presence.
- Educate and deliver thought leadership to investors, portraying the benefits of a strategic allocation to listed real assets.
- Effectively build close, collaborative relationships with key internal stakeholders including: investment teams (including but not limited to, portfolio managers, analysts, portfolio specialists and product managers), distribution including consultant relations and client service, the product team, and the marketing teams.
- Attend (virtually or in-person) conferences and select industry events to drive activities that lead to prospect meetings. Under a normal operating environment, travel in excess of 50% of the time will be require.
- Effectively and enthusiastically represent the investment strategies of Cohen & Steers to prospective clients and field consultants.
- Proactively contribute to the sales team and delivery of the sales targets. Continue to build the Cohen & Steers brand of excellence.

Administrative Responsibilities:

- Maintain an accurate and current record of all activity in Cohen and Steer's CRM, Salesforce.
- Meet or exceed all monthly, quarterly, and annual activity metrics.
- Maintain all FINRA and other licensing, as determined by the firm's Compliance Department.

Minimum Requirements:

Candidates will have a proven record and likely be serving in a similar institutional distribution capacity on behalf of a well-regarded investment management firm. The successful candidate will have a passion for the investment industry and an excellent educational and professional background, which

may include a graduate degree and/or other relevant advanced degrees. An MBA or CFA designation is preferred. The ideal candidate should possess strong communication skills (verbal and written) and be a consummate team player. The ideal candidate should be passionate about investments and a student of the markets. The position calls for an outstanding sales professional who is strategic, collaborative, disciplined, and well-organized with a high level of energy. The ideal candidate will be entrepreneurial by nature, seeking out opportunities to bring in new sources of business.

The successful candidate will ideally have the following experience and qualifications:

- 10 - 15 years minimum of experience successfully marketing diverse asset class strategies (benefit to have real asset experience) to the institutional marketplace
- Experience across the institutional buyer channels (public funds, corporates, E&F, Taft Hartley, insurance, etc...)
- Knowledge of and relationships with field consultants in the territory
- Quantifiable track record of success capital raising through new client acquisition
- A strong investment acumen and technical proficiency
- Bachelor's degree; MBA or CFA is preferred
- Trusted relationships with appropriate industry contacts
- Must be able to think and execute both strategically and tactically
- Self-motivated, passionate, and entrepreneurial
- Collegial and able to work in a team-oriented culture
- Proven ability to identify, cultivate, and raise assets from new business prospects over multiple market cycles
- Familiarity with Salesforce CRM.
- Excellent presentation and communication skills
- FINRA Series 7 and 63 required.
- Extensive travel required

Note: This job description reflects management's assignment of essential functions; it does not prescribe or restrict the tasks that may be assigned. The job title or duties and responsibilities may be changed by the Company at any time.

Learn more at: <https://www.cohenandsteers.com/page/current-job-openings>