Concorde

Director of Strategic Relationships

JOB DESCRIPTION: This position reports to the President and works closely with other members of the executive team. The primary focus of the role is to grow firm revenues by assisting new and existing Financial Professionals with organic growth opportunities and product support to meet clients' needs, in addition to providing support during the onboarding process when transitioning new financial professionals to the firm.

Roles and Responsibilities:

- Provide program support, education, and training to new and existing financial professionals.
- Act as a liaison with strategic partners, including, but not limited to sponsors, fund companies, insurance carriers, money managers, custodians, and clearing firms, to stay abreast of product updates, sales initiatives, and best practices.
- Lead the firm's Strategic Marketing Partnership program. This program is structured to support our partners who are dedicated to the success of the relationship. This entails working with all of our traditional and alternative investment sponsors on the various programs through the year, including sponsorship of our conferences and various events, promoting calls where sponsors have an appearance hosted by the firm's research team, coordinating recorded webinars for distribution to financial professionals, and hosting and leading firm-wide educational calls highlighting sponsor relationships.
- Partner with third-party event planners to assist with conference planning, promotion, and communication. This includes reviewing marketing material announcing various conferences and events, following up on invitations sent, and communicating with sponsors.
- Guide, assist, or generate financial professionals in generating client proposals, financial plans, and/or investment policy statements.
- Play a role in coordinating the transition process by acting as a primary resource, fortifying the new rep relationship with periodic check-ins (daily, if needed), and providing education on the firm's product lines, offerings, and solutions.
- Proactively offer solutions to financial professionals regarding clients and best practices for growing their businesses.
- Continuously improve the value offered to clients for existing and transitioning financial professionals based on each unique situation presented.
- Identify new opportunities to expand relationships with strategic partners and financial professionals, including but not limited to educational webinars and spotlights.
- Assist with coordination of home office visits with recruits as required.
- Additional responsibilities as determined by the Concorde Executive Team.

Requirements:

- A proven record of providing valuable customer service to clients.
- Prior sales experience is a must.
- Experience using Advisory Portfolio Management, Financial Planning, and Brokerage software.

- Effective communication skills and proficiency in phone skills, including communicating with clients and representatives.
- Prior knowledge of hosting web-based meetings.
- Strong ethics with the ability to exemplify the Concorde core values.
- Able to interface and work collaboratively with one or more teams.
- Self-starter with a strong sense of accountability
- Must be able to proactively apply industry knowledge and experience to developing solutions.
- High comfort level with technology and web-based applications
- Able to adapt quickly and easily to changing regulatory, corporate, and technological environment.

Minimum Licensing and Requirements: Series 7, 63 and 65, or 66, and insurance licenses are required.