

Institutional Clients Manager

Salary: R550,000-R900,000 basic + bonus

Location: Cape Town, with national travel

Our Client is an established and highly-awarded boutique asset manager based in Cape Town. They have a proven track record of delivering superb results to clients, exceptional growth, and currently have in excess of R40 billion AUM through local and global investors.

Walker Phillip is currently interviewing suitably qualified and experienced investment professionals with an industry track record of marketing investment products to institutional investors.

Your role will be split between key account management and identifying prospective clients or referral sources. Our client employs a very 'soft sell' approach that is based on meaningful and win-win relationships with their investors. Your client areas are Asset Consultants and Pension Funds on a national basis.

The successful individual will be a graduate with previous experience within the Investment Management industry; and should have strong technical knowledge of portfolio management and investment products.

Duties include:

- Acting as the first point of contact for clients (institutional); attending meetings with clients
- Build strong relationships with current and prospective clients on a national basis
- Develop an effective and proactive approach to generating leads and referral business
- Cultivate referrals/leads, generate interest and collaborate with partners to close sales
- Meet with and educate clients to position the value of funds available. Assess new business opportunities on a consistent basis, including completing book of business reviews, responding to new business inquiries and requests for proposals, and maintaining territory/focus lists.
- Demonstrate active involvement as a team member with accountability and participation.
- Maintain timely, accurate and complete sales administration tasks as determined by the business.

We are looking for someone who is a natural relationship-builder and understands that activity equals results. The company has a strong support team in place, so as to free up your time in pursuing new flows.

The ideal background is someone in a similar role, or an Equity Analyst with solid understanding of investments, but interested in a client-facing function.

This is an excellent opportunity for a personable, hard-working person to join a highly professional business which gives you full autonomy to deliver results.

To apply - please contact Gavin Walker (gavin.walker@walkerphillip.com) or call 0818402669 for a confidential discussion.