POSITION: Sales Executive
REPORTS TO: Senior Vice President of Sales

BACKGROUND:

Adhesion Wealth Advisor Solutions., headquartered in Charlotte, NC, has been delivering innovative financial services solutions since 1999. Completely accessible from the internet, the WealthADV Platform is an innovative practice management solution for independent registered investment advisors (RIAs) comprising: i) outsourced portfolio accounting and back office services; ii) distinctive client communication and reporting services; and iii) a powerful platform for in-house UMAs with overlay portfolio management - utilizing both proprietary investment strategies and those of third party managers. RIAs looking for a competitive edge through enhanced alpha, improved firm profitability, state of the market client reporting, and a platform for scalable growth are finding WealthADV a compelling solution.

Position:

Adhesion is looking for experienced, entrepreneurial, self-starting and motivated outside sales executives to sell the WealthADV Platform and its full suite of companion investment support options into the Independent Registered Investment Advisory (RIA) market. The candidate must demonstrate the ability to capture and command the attention of investment advisors in the lifecycle of the relationship and be competent, energetic, enthused and genuinely engaged in the sales process and the mission of Adhesion.

The position requires some travel (20%), and will likely require that the representative operate out of the office when not traveling, subject to geographical factors should a strong candidate be considered in a location where Adhesion does not maintain an office.

KEY RESPONSIBILITIES:

- Professionally represent the full compliment of WealthADV managed services in a pre defined territory or market division determined by the SVP of Sales
- Actively introduce advisors to the WealthADV Platform and determine the appropriate set of options for that firm highlighting the managed investing and overlay portfolio management capabilities of the platform
- Deliver recurring revenue from closing contracts with advisors and continuously selling into those advisors as additional features become appropriate for each advisor

KEY ACTIVITIES:

- Develop a large pipeline of viable advisor candidates through coordinated prospecting with the SVP of Sales and through active networking in the industry
- Maintain the pipeline of opportunities and client profile through active updates to the sales tracking system
- Actively demonstrate the WealthADV Platform’s capabilities of advisor facing dashboard tools for conducting business and performance reporting

- Attend sales conferences and other company sponsored sales events as requested
- Make in-person sales calls as the situation dictates

CORE SKILLS & COMPETENCIES:

A qualified candidate must have the following key skills and capabilities:

- Demonstrated success in communicating and gaining the confidence of key decision makers in the investment advisory marketplace and have the references to prove it
- High level of proficiency in the securities business with an understanding of security types, separate accounts, Overlay Portfolio Management and model-based investment management, performance reporting and other general investment advisory matters
- Effective territory management skills and the ability to move many advisory firms simultaneously through a rapid sales process
- Ability to communicate and partner effectively with custodians, research providers, investment strategy product providers and other Adhesion employees and senior managers in building an effective network to generate business
- Executive presence & strong communication (both written and oral) skills to command attention and authority with prospects and customers

ADDITIONAL REQUIREMENTS:

- Seven years minimum experience in financial services sales in the securities business or related financial services field
- Two to Five years minimum sales experience selling to the independent registered investment advisors, independent broker dealers or related field such as trust, experience with institutional custody and clearing desirable
- Proven ability to provide constructive feedback to sales management and product management and communicate ideas from the field
- Experience with web-based technology solutions and ability to freely demonstrate the solution unattended
- 4 Year College Degree, - MBA desired but not required

COMPENSATION:

- Competitive salary, commission plan and excellent benefits
- Potential equity options

To be considered for this position, please send your resume and salary requirements to: richc@wealthadv.com or call 843-388-6661