

## Position Description



**Position Title:** Solution Consultant 1

**Department:** Business Development

**Reports To:** Director of Business Development

**Job Location:** Adhesion's main office in Charlotte, NC

**Desired Experience:** 1-3 years of industry related business development experience

**Required Education:** Bachelor's degree from four-year college or university.

**Compensation Structure:** Base salary plus commission based on net new assets

### Company Overview

Adhesion Wealth Advisor Solutions Inc. (Adhesion) is a specialist at delivering comprehensive investment services to the fee-only wealth management industry. We passionately believe in the independent investment advisor community, the fiduciary model and doing whatever it takes to raise the bar in the delivery of conflict-free, fee-based financial guidance to consumers. We have dedicated ourselves exclusively to this cause for over a decade.

### Position Overview

Adhesion is looking for a junior level, entrepreneurial, self-starting and motivated individual to develop new client relationships for Adhesion in the independent Registered Investment Advisory (RIA) and Broker-Dealer (IBD) markets, using a consultative selling process.

**Essential Duties and Responsibilities** include the following. Other duties may be assigned.

- Professionally represent the full complement of Adhesion's managed investing services.
- Develop a large pipeline of viable prospects in our target market through coordinated prospecting with your manager and through active networking in the industry and with Adhesion's external partners. Keep timely and detailed records in the company's sales tracking system.
- Introduce prospect firms to the Adhesion Platform through a consultative sales process, with the ability to show how the Adhesion platform will be beneficial to their business.
- Understand prospect's investment program design objectives, consult on design options, and in conjunction with Adhesion's investment consulting team, facilitate the presentation of appropriate investment options.
- Ability to successfully close new business opportunities and to shepherd new clients through the onboarding of new asset under management in a cooperative fashion with Adhesion's client support and relationship management teams.
- Attend industry conferences and other company identified events as requested. Make in-person sales calls as situations dictates.

### QUALIFICATIONS:

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

### Business and Relationship Development Skills:

To perform this job successfully, an individual will need to demonstrate:

- Ability to profile prospects through thoughtful, positive and engaging conversation. The successful candidate will have a desire to learn about the prospects' business, ask thought provoking questions, challenge business practices all while positioning the Adhesion solution;
- Ability to communicate and work effectively with industry partners and centers of influence, other Adhesion employees and senior managers in building an effective network to generate business.
- Project professionalism, competence and energetic enthusiasm in all interactions and to command attention and authority with prospects and customers.

**Industry Experience:**

Basic proficiency in the investment management and/ or financial advisory business with an understanding of security types, investment products, portfolio management, investment performance and other general investment advisory matters.