

Position:	Client Relationship Manager
Posting Date:	Nov 10, 2011
Type:	Full Time
Experience:	Associate (4-7 Year)
Reports to:	Chief Solutions Officer
Location:	Charlotte, NC



Overview

Adhesion is seeking a key contributor to help support the rapid growth of our Investment Management Platform. We are looking for a highly motivated and entrepreneurial candidate to fill the role Client Relationship Manager (CRM). As a Client Relationship Manager, you will take a central role in the success and development of key relationships with our investment advisory clients. This hands-on and highly strategic role will require a candidate who can thrive in a fast paced and dynamic environment.

Job Description

The Client Relationship Manager will be responsible for the success and development of a group of Adhesion's investment advisory clients. The CRM will be instrumental in developing business plans and identifying growth opportunities that will increase the advisor's overall adoption of Adhesion's services as well as enhance the overall profitability profile to Adhesion.

To accomplish this mission, the Relationship Manager will:

- Partner with Adhesion's registered investment advisory (RIA) clients to evaluate their business direction and objectives, measuring adoption and proficiency with Adhesion's services. They will conduct periodic quantitative business effectiveness reviews to ensure that the proper mix of products are being utilized as well as ensuring that service level standards are being met.
- Be responsible for ensuring the overall health of the client relationship. The Client Relationship Manager will develop and maintain the Client Plan, which includes a scorecard of critical success factors, to be periodically reviewed with Adhesion management.
- Provide consultation to client advisors on the effective use of Adhesion's reporting and investment management services within the advisor's practice, train advisor personnel on the tools and processes, and 'solution sell' additional Adhesion services.
- Represent the voice of the advisor into the product development prioritization.
- With regard to Adhesion's investment management services, the Client Relationship Manager will:
 - Understand advisor's current investment program and portfolio construction approach as well as product and manager usage – in both their current and desired-state.
 - Understand advisor's investment program design objectives, consult on design options, and facilitate product manager selection process.
 - Initiate and monitor account transition planning projects, as needed.

Desired Skills & Experience

- Minimum of 4-7 years' experience working in or with investment advisor / wealth management/ asset management firms, in a relationship management, consultant or client facing (advisor) capacity. The ideal candidate possesses hands on experience with investment performance reporting, portfolio accounting, and separate or unified managed accounts (UMAs).
- The candidate must be a self-starter that is able to work proactively and independently, and demonstrate excellence with: written and oral communication; task organization, meeting and project management, formal presentations, and relationship building.
- The candidate will be required to quickly develop expert level knowledge of the functions, capabilities and use cases of Adhesion's reporting and investment management service offerings with the objective to competently provide demonstrations, consultations and training to prospective and existing client advisors.
- The candidate will be comfortable communicating with the most senior levels of management within our clients and develop sustainable personal relationships, deepen the business relationship, and maintain Adhesion's exceptional client retention rate.
- The candidate must effectively work with multiple organizational groups within Adhesion including Sales, Client Support, Portfolio Management, and Product Management.
- 4-year college degree is required.

Additional Information

- Competitive compensation consisting of base salary plus variable component determined by achievement of relationship growth goals.
- Excellent benefits, free parking, onsite fitness facility,
- Southpark location.
- Local candidates only (Charlotte, NC area).
- Relocation assistance not provided.
- No third party applications.

Company Description

Adhesion Wealth Advisor Solutions is a company focused on providing innovative solutions for registered investment advisors. The WealthADV Platform from Adhesion is a comprehensive Managed Investing solution, providing model-based unified managed accounts, overlay & tax-optimized portfolio management, distinctive client reporting and managed back office services. With WealthADV, advisors stay at the forefront of the market and have a scalable, multi-custodian platform upon which to grow successful practices.

For the 2nd consecutive quarter (effective June 2011), Adhesion has placed in the Top 10 Largest UMA Platform leaderboard, according to the Cerulli Associates Managed Accounts Research.

Qualified candidates should forward resume to resume@adhesionwealth.com