

LIM Relationship Management/New Business Development

Longfellow Investment Management (LIM) is an independent, 100% employee-owned investment firm managing \$17 billion in fixed income, equity, and alternative investment strategies. We manage separate accounts for our nationally based, institutional clients. LIM is a certified Women's Business Enterprise and an affirmative action – equal opportunity employer. LIM provides a small firm environment with comprehensive investment industry exposure. In addition to salary, we offer an attractive benefits package.

Job Description

The Relationship Management /New Business Development position is part of an interdisciplinary marketing, consultant relations, distribution, and client service team and plays an important role in supporting the relationship management and business development activities of the firm. This role requires the ability to understand general investment product-related concepts and convey key themes effectively.

Responsibilities:

- Manage new business opportunities through the due diligence process; maintain involvement in communication and meetings, manage information requests, and respond to follow-up questions
- Contribute to strategic planning and special projects by gathering information on market segments, competitors, and consultants as part of distribution planning and execution
- Monitor competitive landscape with regard to strategies and industry trends; evaluate LIM strategies versus the competitive universe on a quarterly basis
- Manage routine client meeting requests, general client/consultant requests, monthly/quarterly database updates, and ad hoc inquiries
- Manage consultant due diligence process; act as the point person for regular due diligence visits and coordinate the agenda; assist PMs with client service needs
- Proactively reach out to clients and/or their consultants on a regular basis; cross-sell and expand existing relationships
- Participate in industry conferences and events to promote the firm and build relationships within target markets and the consultant community

Qualifications:

- Undergraduate degree is required. A CFA and/or MBA are preferred.
- Hands-on PC proficiency with MS Word, Excel, and PowerPoint. Knowledge of Salesforce, eVestment, and other industry systems is a plus.
- Knowledge of fixed income and equity strategies.
- Seven + years of experience in investment management new business development, consultant relations, or client service.
- A strong work ethic and the ability to work effectively as part of a team and independently.
- History of successfully developing relationships or expanding relationships with institutional clients or consultants.



- Able to work in a collegial environment, displaying polish and a professional character to be viewed internally and externally as a respected individual.
- Solid interpersonal skills and exceptional communication (oral and written) and presentation skills. Ability to prepare external communications.
- Strong organizational skills, ability to prioritize competing requests and projects, and see projects through to completion

This position will require independent travel.

Qualified applicants should email a cover letter and their resume to:

Jobs@LongfellowIM.com

Subject: Relationship Management/New Business Development

No calls please