REGIONAL SALES ASSOCIATE - INTERNAL SALES

Confluence Investment Management is currently seeking a highly motivated and enthusiastic sales professional to join its sales distribution team in our St. Louis, MO location. Confluence works through a variety of national and regional broker/dealers to offer investment solutions to advisors. The role of Regional Sales Associate, also referred to as an Internal Wholesaler, would support the efforts of Confluence's Regional Sales Representatives (also known as External Wholesalers) to help financial advisors build their business with individual investors. An individual who has previously worked with financial advisors in a support capacity may find this an exciting opportunity to consider.

Primary Responsibilities:

The Regional Sales Associate/Internal Wholesaler will collaborate with our External Wholesalers and be responsible for new business development within a geographic sales territory. Working together as a team, the Internal and External Wholesaler will execute a business plan throughout their region to support the suite of Confluence investment portfolios within the financial advisor community, maintaining a high level of client connectivity and engagement. Day-to-day activities for the Regional Sales Associate will include the following:

- Engage inbound call inquiries with professionalism and enthusiasm
- Prospect and qualify new producers via outbound phone efforts
- Expand current advisor base by building relationships and asking for referrals
- Follow up on literature and proposal requests
- Follow up on External Wholesaler meetings
- Assist in booking and confirming External appointment calendar
- New business "Thank You" calls
- Drive new business by positioning and differentiating Confluence portfolios alongside competitor firms
- Continuing Education: Be a student of the domestic & international markets

The required experience for this position includes a bachelor's degree and a high level of proficiency with Microsoft Office products. This position does not require regular travel.

About Confluence

Confluence Investment Management is an independent Registered Investment Adviser that provides professional portfolio management and advisory services to institutional and individual clients. The investment teams at Confluence specialize in asset allocation, domestic value equities, international equities, and alternative investment portfolio management. As of March 31, 2022, Confluence had more than $12.0 billion in assets under management and advisement.

For Further Information - Contact

Wayne Knowles, National Sales Director, wknowles@confluenceim.com, (314-526-0914)