



Institutional Sales Director

CLIENT OVERVIEW

The mission of this financial organization is to partner with member shareholders in the region to provide competitively priced funding, a reasonable return on investment, and support for community investment activities to promote home ownership.

POSTION SUMMARY

The Institutional Sales Director will primarily be responsible for client business development and relationship management within the banking sectors of the IL/WI district.

ESSENTIAL DUTIES

- Markets banking products and services to clients and prospects.
- Services existing client relationships and develops and cultivates relationships with new clients.
- Acts as consultant and trusted advisor to client contacts: negotiating credit arrangements, promoting and selling new solutions, and generating ideas for new business opportunities.
- Promotes the sales district to prospective depository clients through client events, relationships with third party influencers (asset managers, rating agencies, regulators), and other marketing efforts.
- Works closely with other departments at within the organizaiton to support and structure credit solutions to drive client business.
- Travels to meet with clients directly and at trade association and other conference events.

REQUIREMENTS

- Bachelor's Degree required; MBA in Finance / CFA strongly desired.
- 7-10 years of financial analysis and client servicing experience, or a combination of formal corporate credit / investment banking / asset management training and 5-7 years of client servicing experience.
- Minimum 2-4 years of direct retail or commercial banking coverage experience.

Institutional Sales Director

SKILLS

- Experience negotiating interest rates, price, terms, and collateral requirements.
- Effective organizational, multi-tasking, and prioritizing skills.
- Knowledge of finance and relevant business segment specific issues, acquired through either an advanced degree or experience in retail, commercial or investment banking, asset management, credit analysis, business development or relationship management.
- Proven high-level relationships with C-suite executives is a must.
- Experience with formulating and crafting sales presentations.
- Skills in negotiation, leadership, and sales are necessary to service the client relationship.
- Knowledge of applicable industry laws and regulations, usually acquired through prior experience or the completion of a formal credit or rotational program, is preferred.
- Must be willing to travel up to 40%.