T.RowePrice®
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Intermediary Sales Consultant (Broker/Dealer, RPS & DCIO)

Multiple Locations Including Owings Mills, MD, Colorado Springs, CO and San Francisco, CA

The Path Forward Return to Work program at T. Rowe Price is a direct hire program for experienced professionals returning to the workforce after taking time off for caregiving. The program is open to individuals who have at least 5 years of professional experience and have been out of the paid workforce for at least two years to focus on caring for yourself or a loved one. If you meet these criteria, we welcome you to apply.

At T. Rowe Price we are excited to be part of the Path Forward program because we appreciate the skills you can offer, the perspective you provide, and the contributions you will make. This program offers you a chance to revamp your skills, update your resume with new experience, and make connections with others transitioning back to the workforce. It also offers support through Path Forward, a nonprofit organization on a mission to empower people who've been focused on caregiving transition back to the paid workforce.

Role Summary

The Intermediary Sales Consultant is a sales and relationship partner with external sales professionals with whom they aid in the development of each respective territory and the management of relationships and sales opportunities with a target audience of Financial Advisors. You work collaboratively to cover identified advisors based on their needs and/or refer them to external counterparts as appropriate. You are accountable for prospecting, selling, and retaining advisors within each assigned territory through a consultative process and will contribute to gross sales, net new flows (when applicable), redemption rates, and select activity targets, as well as maintain shared accountability for territory goals with external counterparts.

Responsibilities

- **Relationship Management -** We work with assigned external sales partners in optimizing client coverage within a territory. This work includes both encouraging existing relationships to deepen and broaden those with T. Rowe Price, while also strategically prospecting to discover relationships that could be mutually beneficial. You're accountable for aiding your external partner in elevating T. Rowe Price's brand awareness, building client loyalty, growing the distribution of the firm's products, and driving sales among financial advisors within their territories.
- **Business Development -** You develop new business with your territory partner. You are collaborative in identifying sales opportunities, deepen overall territories, and independently sell to prospects as well as deepen relationships with existing advisors. ISCs can use a service associate role to perform some specific non-client engagement activities.
- **Territory Management -** We apply various data sources, both internal and third party, to identify, aggregate and prioritize targets of opportunity (both current clients and prospects) within the assigned territory and segment. This allows you to have lists of prioritized advisors.
- **Sales Support and Follow-up -** In partnership with your external partners, you deliver on preparation and follow-up items that help ensure they are prepared when in the field. This includes but is not limited to the following activities such: post face to face meeting follow-up emails and outbound calls to advisors/key contacts, preparation work for investment professional meetings and/or due diligence meetings held by either the ISC or the external partner, coordination with Service team.
- **Travel/Client Facing Engagements -** You will attend periodic conferences to represent the firm and to win leads for all territories. Regular territory travel with their territory partner is also required.

Qualifications

Required:

- Bachelor's degree or the equivalent combination of education and relevant experience AND 5+ years of total work experience
- This role requires the FINRA Series 7 and Series 66 licenses. Licenses may be obtained within first 3 months of hire if not currently held.

Preferred:

- MBA, CFA, CFP, CIMA
- knowledge of the financial service industry
- A passion for keeping up to date in the economy and financial services industry
- Strong consultative, client service, and relationship building skills
- Strong interpersonal skills and ability to flex to the client
- Proven results using a consultative sales process
- Sophisticated presentation and communication skills

Work Flexibility: This role is eligible for remote work up to two days a week.

For immediate consideration, please CLICK HERE to apply.