



Sales Associate Personal Investors

Multiple Locations: Owings Mills, MD and Colorado Springs, CO

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

T. Rowe Price is currently seeking to hire a Sales Associate Personal Investors that can be based in either Owings Mills, MD or Colorado Springs, CO campus. The role requires 3 days onsite and up to 2 days remote.

As a Sales Associate Personal Investors, you will provide education and/or advice to T. Rowe Price's Core Personal Investors. The primary objective is to drive net new flows and retain assets within the Individual Investors organization. Our consistently successful Sales Associates are focused on helping clients achieve their short- and long-term investment and financial planning goals along with ownership of their individual success in a collaborative, supportive team-oriented environment. Join our team and you will receive dedicated paid time and resources to support you through a successful licensing process.

T. Rowe Price offers unparalleled active management products and services. Come join our team and help our clients be successful in their investment and retirement planning!

Responsibilities

- Serve as the initial point of contact for prospects and existing clients who are looking for education and/or advice relative to their financial needs (investment, retirement, and education planning)
- Deliver on defined sales targets, quality of conversations, and other role-based responsibilities
- Develop and maintain proficient knowledge of T. Rowe Price products and services.
- Drive client satisfaction and support asset retention efforts with established relationships of Core Personal Investors clients by understanding their broader investment planning needs.
- Leverage financial acumen to manage multiple clients in different stages of the buying process.
- Use a consultative sales approach to uncover additional opportunities for consolidation or additional sales opportunities through skilled questioning and win business by effectively branding TRP solutions (outside assets, external referrals, etc.)
- Nurture client relationship and brand loyalty with effective and consistent process to move opportunities forward.
- Capitalize on internal referrals to maximize relationships with existing clients and deliver new investor relationships to the firm.
- Liaise with internal partners to ensure clients receive appropriate solutions.

Qualifications

Required:

- Bachelor's degree or the equivalent combination of education and relevant experience
- 0+ years of total relevant work experience



Preferred Qualifications

- This role requires the FINRA Series 7 and 66 licenses must be obtained within first 6 months of hire if not currently held. If the required licensures are not obtained in this timeframe, the individual will have to vacate the role, or find another role internally within 10 days of failing required licensure exam/s.
- Dedicated paid time and resources are provided as support through the licensing process.

Regional Requirements

- This role requires the FINRA Series 7 and 66 licenses must be obtained within first 6 months of hire if not currently held. If the required licensures are not obtained in this timeframe, the individual will have to vacate the role, or find another role internally within 10 days of failing required licensure exam/s.
- Dedicated paid time and resources are provided as support through the licensing process.

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

*Expected starting salary for this role is \$62,000.

(Colorado only) Salary range minimum is one component of our total compensation and benefits package. *Note: Disclosure as required by sb19-085 of the minimum salary compensation for this role when being hired into our offices in Colorado.*

For immediate consideration, please **CLICK HERE** to apply.