

Financial Consultant, Direct Sales (August 2017)

TC5042KC

American Century Investments® is a leading asset manager focused on delivering investment results and building long-term client relationships while supporting research that can improve human health and save lives. It's how we manage money and make an impact.

Job Description

The **Financial Consultant** is responsible for the business development of a defined book of business of American Century's high net worth client base with greater than \$250k in investable assets, and accountable for acquiring new assets and new clients to American Century Investments. This sales position is responsible for self-generating new opportunities within an assigned territory/book by establishing trust and rapport with American Century Investments' clients and prospects to build long-term relationships. You will serve between 300-400 clients when the book reaches full capacity.

The primary responsibilities of the **Financial Consultant** are:

- Provide clients a single point of contact for all of their investment, planning and guidance needs
- Identify, execute and follow through on opportunities to gather new and additional client assets by engaging in client-centered discussions
- Develop long-term customer relationships by careful planning to meet clients' short and long-term goals by providing and demonstrating solid financial planning skills and client-centered advice and guidance interactions
- Effectively manage a pipeline of leads and prospects
- Outbound calling to prospects and current clients based on leads from internal scoring models, campaigns and self-generated leads from assigned book of business
- Work inbound leads from the contact center and branches as they are uncovered
- Demonstrate a business development focus resulting in additional opportunities through engagements with clients and prospects
- Adhere and leverage compliance/risk tools and procedures while maintaining the client's best interest
- Utilize advice and guidance tools, fund analysis and other resources to strategically leverage products as appropriate
- Position appropriate products based on needs of the client's financial situation
- Leverage data and insights to create effective outreach efforts
- Achieve focused business/sales goals as defined by the needs of the business at both a team (?) and individual level
- Effectively work with business partners including Marketing, Client Business Management, Contact Center, and external partners with a focus on acquisition, process improvements, and increased efficiency and productivity

Required Skills

- Highly motivated, self-starter
- Demonstrated practice of a sales process including prospecting, profiling, assessing needs, presenting solutions and closing
- Excellent communication, presentation and consultative selling skills
- Ability to complete financial plans
- Ability to manage relationships with clients including building trust and rapport
- Ability to have educational/guidance-based conversations to help clients make informed investment decisions with respect to their financial planning goals
- Exhibits capital markets and competitive knowledge: compare, contrast and communicate American Century products with competitor products
- Utilizes effective time management/prioritization skills and leverages resources to maximize results
- Adaptable to the evolving needs of clients, systems and internal business model
- Collaborates and innovates – open to new ideas
- Systems proficiency including Seismic, Salesforce, Microsoft Office
- Plan and execute territory travel

Required Experience/Education

- Bachelor's Degree or an equivalent combination of education and professional work experience
- Certified Financial Planner (CFP)
- Series 7 and 66
- Financial planning experience preferred
- Minimum of 3 years' sales experience preferred

The above statements are intended to describe the general nature and level of work being performed by people assigned to this job. They are not intended to be a complete list of all responsibilities, duties, and skills required.

EOE Policy Statement: American Century Investments believes all individuals are entitled to equal employment opportunity and advancement opportunities without regard to race, religious creed, color, sex, national origin, ancestry, physical disability, mental disability, medical condition, genetic information, marital status, gender, gender identity, gender expression, age for individuals forty years of age and older, military and veteran status, sexual orientation, and any other basis protected by applicable federal, state and local laws. ACI does not discriminate or adopt any policy that discriminates against an individual or any group of individuals on any of these bases.