



## **Manager of Business Development and Marketing**

### The Company:

SKBA Capital Management is an independent San Francisco based boutique investment management firm. Since 1989, the firm has managed equity and fixed income portfolios for clients including institutions, pension plans, corporations, foundations, endowments and private clients. We bring unwavering dedication to a consistent investment process that has been developed and refined for over 30 years. Our value-oriented firm relies on team decision-making processes in all of our business activities, from portfolio management to client service, operations and compliance, and our boutique culture remains a hallmark of our firm. As a majority employee-owned firm our interests are aligned with those of our clients, and we strive to be defined by our time-tested investment approach, dedication to client service and high ethical standards.

### Position Overview:

SKBA is seeking a self-directed and organized individual to lead the company's business development and marketing efforts. The person filling the role will contribute meaningfully to an established and respected firm and serve an essential role in growing the firm's business. This position requires someone with capital markets experience who demonstrates sound business judgment, initiative and impeccable communication skills. SKBA seeks a person committed to maintaining a high-level of client satisfaction and who can thrive in a collaborative and team-based work environment. The candidate will need to demonstrate coach and player characteristics.

### Responsibilities Overview:

- Identify new business opportunities and actively engage various channels for business growth in separate accounts, mutual funds, and platforms
- Manage and refine campaign messaging to effectively communicate firm's philosophy and products through our website, outgoing correspondence, presentation materials, and press releases
- Oversee product and brand messaging so that the firm's investment approach and product positioning is accurately communicated in client materials, questionnaires, RFPs, and in databases
- Operate as the first point of contact for new business inquiries
- Participate in relevant industry conferences and successfully communicate our investment approach and products through one-on-one relationship development and speaking engagements
- Plan regular sales and marketing meetings and lead in the completion of next step and action items related to expanding marketing messaging, relationship development, and new business opportunities
- Track sales and pipeline reports and manage the company's CRM database
- Manage relationships with relevant technology and marketing vendors
- Oversee the completion of due diligence requests and RFPs/RFIs ensuring that company messaging is effectively presented and communicated
- Maintain critical documents and support in various aspects of compliance documentation per industry policies and requirements
- Assume special project work and additional responsibilities as requested or assigned

Qualifications:

- 7 - 10 years of experience as a marketing professional in the investment management or capital markets industry
- Bachelor's degree is required
- Series 6 or 7 and Series 63 and/or 65 required
- Familiarity and comfort operating within multiple business channels: separate accounts, mutual funds, and SMA/UMA managed accounts
- Demonstrable experience generating new business
- Experience managing media content and developing effective campaign messaging in materials such as pitchbooks, product brochures, fact sheets, and websites
- Proven experience with planning and executing marketing plans that resulted in growing mutual fund assets and expanding client base
- Established relationships within the consultant community
- Driven to generate leads and demonstrate the persistence and enthusiasm to pursue new business opportunities
- Working understanding of databases and effective means by which to present firm data and messaging
- Experience with industry conferences and public speaking
- Adept at Project Management with the ability to manage tasks and see projects to completion within a set timeframe

Skills:

- Excellent organizational and project planning/implementation skills with proven track record of meeting deadlines and goals
- Deep understanding of the investment industry and maintains current and relevant knowledge of product positioning versus competitors
- Demonstrates sound business judgement and professionalism and is results-driven
- Strong written communication skills with the ability to develop product and firm messaging
- Effective and professional verbal communication skills with a high comfort level for networking and sales
- Demonstrates great follow-through and is detail oriented
- Strong skills in Microsoft Office (PowerPoint, Outlook, Excel and Word) and experience with CRM systems
- Desire to work in a boutique firm with a collaborative work environment

Position Specifics:

- This is a San Francisco financial district based position that offers a hybrid work schedule
- Travel is a component to this role in order to directly develop relationships and attend industry conferences

*Please send your CV and Cover Letter to: [hr@skba.com](mailto:hr@skba.com)*