



TITLE	LOCATION	CLASSIFICATION
Investment Sales – Internal Wholesaler	Madison, WI	Full Time

Based in Wisconsin's capital city since its founding in 1974, Madison has grown from a local firm into a nationally recognized asset manager entrusted with assets across a suite of mutual funds, managed accounts and customized portfolios. The catalyst for Madison's growth has been a management style that looks beyond short-term trends, emphasizing the performance of investments over full market cycles. Our highly-credentialed portfolio managers, analysts and traders share a belief in high-conviction, risk-conscious investing, and have the autonomy to shape this approach within their own investment teams. For more information, please visit www.madisonadv.com

POSITION DESCRIPTION

Madison Investment Advisors is seeking an enthusiastic, organized, multi-tasking individual to serve as an Associate within the Business Development Team. The ideal candidate will exhibit a high attention to detail, have general investment knowledge and curiosity about the financial markets. The position will be responsible for driving sales by proactively and reactively marketing Madison mutual funds and separate account product solutions. This is accomplished by developing new business leads, cultivating existing relationships and demonstrating excellent problem solving skills to promote the sale of Madison investment products.

The Internal Wholesale Associate will report to the firm's Business Development Team.

Specific duties include:

- Establish and maintain ongoing relationship with Regional Director (RD) with a common goal of increasing company's share of mutual funds and separate account marketplace as well as visibility of Madison's products and dedicated sales support and service through proactive calling.
- Daily contact with RD (i.e. territory coverage, relationship building in accordance with business plan and/or sales goals.) May be required to work with multiple RD's and territories.
- Document all proactive activity and pertinent issues in the CRM system i.e. appointments, thank you calls, call campaigns, and sales opportunities etc.
- Participate actively in the development and successful execution of the territory business plan.
- Productively work together with other home office departments, other RD's, internal sales operational team and investment management teams to effectively service the selling relationships.
- Demonstrate excellent listening skills to better assess a representative's needs and determine the type of sales support necessary to accomplish the objective, adding value to the products, service and sales support delivered.

Required Qualifications:

- 1 – 3 years of similar work experience in the financial services industry
- Bachelor's Degree – Marketing, Finance, Economic or Business related a plus
- Holds Series 7 and Series 66 or 63/65 license
- Knowledge of Microsoft Office Suite with a focus on Excel
- Familiarity with MorningStar Direct, FactSet, Bloomberg and ProTrak/Salesforce/CRM a plus

Leadership & Behavioral Skills:

- Team player that strives for excellence
- Independently motivated with a solid work ethic
- Proven ability to positively manage multiple priorities while collaborating with others
- Excellent verbal and written communication skills

RESUMES CAN BE SENT ELECTRONICALLY TO Jobs.Madison@Madisonadv.com