Location: Remote

Job Summary

We are seeking a motivated and detail-oriented Internal Sales Associate, ETFs, to support our growing ETF distribution team. This role is responsible for engaging financial advisors, generating and qualifying sales leads, and supporting senior sales professionals in driving asset growth across Registered Investment Advisors (RIAs) and Broker/Dealer platforms.

The ideal candidate is early in their sales career, highly organized, and eager to learn the ETF and asset management business in a fast-paced, entrepreneurial environment.

About Us

We are a fast-growing asset management firm focused on innovative ETF solutions that solve real portfolio challenges for advisors and institutions. Our culture is entrepreneurial, transparent, and performance oriented. We value collaboration, accountability, and intellectual curiosity.

Key Responsibilities

- Proactively engage RIAs, Broker/Dealers, and related financial professionals via phone, email, and virtual meetings to generate and qualify sales leads.
- Support senior sales professionals by setting meetings, coordinating follow-ups, and preparing advisors for deeper product discussions.
- Execute targeted outbound campaigns aligned with broader territory and distribution strategies.
- Conduct introductory ETF product conversations and deliver high-level product overviews to prospective clients.
- Track all activity in CRM, maintain accurate pipeline data, and provide regular reporting on outreach, meetings, and lead conversion.
- Collaborate closely with external sales, marketing, and product teams to support campaigns, events, and client engagement initiatives.
- Assist with preparation for advisor meetings, presentations, webinars, and industry events.
- Gather and share market intelligence and advisor feedback to support sales strategy and product positioning.

Qualifications

- 2–3 years of experience in asset management, ETF distribution, internal sales, or a related financial services role.
- Strong interest in investment products, financial markets, and advisor-focused sales.
- Ability to communicate investment concepts clearly and professionally.
- Proven ability to manage high-volume outreach and prioritize effectively in a metrics-driven environment.
- Strong organizational skills and attention to detail, particularly with CRM and pipeline management.
- FINRA Series 65 (or ability to obtain within a specified timeframe).

Preferred Characteristics

- Exposure to ETFs, model portfolios, or advisory platforms.
- Familiarity with CRM systems (e.g., Salesforce) and virtual selling tools.
- Coachable, proactive, and eager to grow into a more senior sales role over time.
- Team-oriented mindset with a strong work ethic and positive attitude.

Compensation and Benefits

We offer a competitive compensation package that includes:

- Base salary commensurate with experience.
- Performance-based incentive tied to activity and lead generation metrics.
- Comprehensive benefits, including medical, dental, vision, and 401(k) with company match.
- Flexible remote work policy, with periodic in-person meetings and travel as required.
- Professional development support, including licensing, training, and exposure to senior sales leadership.

Equal Opportunity Employer Statement

We are an Equal Opportunity Employer and are committed to creating an inclusive environment for all employees. All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity or expression, national origin, age, disability, protected veteran status, or any other characteristic protected by applicable law.