

Metis Global Partners
Director of Institutional Client Development
Position Profile

METIS GLOBAL PARTNERS

Metis Global Partners, LLC is a diverse/woman-owned and led institutional global equity manager founded in 2013 and based in San Diego, California. The firm's active value-oriented Global, International and Emerging Market systematic strategies have enjoyed recently renewed interest in Value investing. In addition, response to Metis' Beta capabilities launch in 2021 has been very positive, with inflows to date exceeding \$1 billion over the last year and 25+ new institutional Beta clients. In 2022, Metis plans to launch its Guided Beta™ strategies to provide clients with customized Beta solutions including Climate Aligned and ESG Beta strategies.

Metis is experiencing dynamic growth and maintains an entrepreneurial culture with opportunity for team members to make significant contributions and grow with the firm. Working at Metis, you'll be empowered to contribute meaningfully to a rapidly growing company. You'll be involved in the long-term evolution of the firm, helping to build the Metis of the future. And you'll be able to serve an agent of change in the industry, supporting the growth of Diversity and Inclusion through a diverse/woman-owned organization.

Cognitive diversity and intellectual curiosity are guiding lights at Metis, allowing the firm to embrace and harness unique perspectives into the management and day-to-day operations of the firm. This, combined with a flat organizational structure, allows contribution of opinion and thought to flow freely.

POSITION SUMMARY

The Director of Institutional Client Development will be responsible for developing and maintaining consultant, OCIO and institutional prospect relationships. This position represents a high growth opportunity to join a team of experienced investment professionals managing investment strategies that utilize a combination of systematic active and beta approaches. This individual's success will be directly tied to the firm's growth of assets, primarily institutional investment products.

The Director of Institutional Client Development will cultivate existing prospects and clients as well as initiate and develop new prospects and clients. This individual will handle initial meetings, facilitate information and RFP flow with prospects, lead final presentations in partnership with the firm's portfolio managers, and manage the sales closing process.

Responsibilities

- Develop and leverage increased awareness and credibility among investment consultants and OCIOs
- Work with consultant research teams to achieve investment product approval and ratings
- Work with senior management to develop marketing plans around the products and investor base
- Effectively communicate and deliver Metis' investment philosophy, strategy, process, and performance to consultants, clients and prospects
- Manage the sales cycle and be accountable for identifying, qualifying, attracting, and closing investment business
- Identify cross-selling opportunities
- Organize sales/client road shows, including scheduling meetings and preparing marketing materials for distribution
- Represent firm at networking events, conferences and other marketing opportunities

Required Skills

Candidates of varying background and experience will be considered. We prefer candidates who possess the following:

- Extensive existing consultant, OCIO, institutional, and family office prospect networks
- A focus on driving results and closing deals

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- Ability to understand and communicate a sophisticated investment process in detail with knowledgeable clients and consultants
- Working knowledge of Global Equity Active and/or Beta strategies
- Ability to work effectively in a fast-paced, collaborative, team-oriented environment to work towards a common goal
- Excellent written and verbal communication skills
- Experience in marketing or outside sales involving starting and building lasting relationships
- Ability to develop and maintain long term relationships with institutional investors, consultants and financial intermediaries

QUALIFICATIONS

Candidates should have at least 5-10+ years of investment sales experience, preferably with a global equity asset manager. Along with experience, depth of contacts with institutional investors and consultants is strongly preferred. MBA and/or CFA are a plus.

COMPETENCIES

- *Inclusive Leadership*: Demonstrated ability to understand, develop, and motivate diverse team members
- *Developing and Leveraging Relationships*: Creating and cultivating networks of people and integrating them to accomplish objectives
- *Persuasiveness*: Convincing others to act on information or recommendations based on compelling logic or common best interests
- *Competitive Drive*: Pushing oneself and the organization to be the best, thought leaders, highly trusted, and to secure advantage against competitors
- *Highly Organized*: Follow through, responsive, solutions oriented

COMPENSATION

Our client is prepared to offer a very attractive compensation package, including a competitive base salary and commission as well as health, 401(k), and vacation benefits.

Equal Employment Opportunity Policy

Our client provides equal employment opportunities (EEO) to all employees and applicants for employment and prohibits discrimination and harassment based on race, color, religion, gender, gender identity, national origin, sexual orientation, age, disability, or veteran status.

CONTACT

The Lawrence Advisory has been engaged by the client to help in this confidential search. The search is being led by:

Tracy L. Lawrence
Founder & CEO

tracy@thelawrenceadvisory.com

Steve Foster
Principal

steve@thelawrenceadvisory.com

Please submit letters of interest and resumes to:

Tiffany Scott
Director of Candidate Development
tiffany@thelawrenceadvisory.com

ABOUT THE LAWRENCE ADVISORY

The Lawrence Advisory is a human-capital consulting firm that offers Executive Search, Organizational Development and Leadership Coaching. We specialize in servicing innovative organizations with distinct cultures. For more information, refer to our website at <http://www.thelawrenceadvisory.com>.