GPA GOVERNMENT PORTFOLIO ADVISORS

To apply, please email your resume and a cover letter to mitch@gpafixedincome.com

Institutional Sales & Relationship Manager – Institutional Fixed Income Clients

Job Location: Portland, OR

Who are we?

Government Portfolio Advisors (GPA) is a boutique, independent Registered Investment Advisory firm with headquarters in Portland, Oregon. Founded in 2014 by a team of seasoned advisors with decades of experience assisting public entities with their investment management programs, we are dedicated to serving institutions and high net worth individuals with a collaborative approach that provides unparalleled service and proven results. A market leader within the public entity space, GPA provides unbiased fixed-income investment management and advice focused on the power of partnership. We proudly serve 70+ clients with over $20 Billion in assets under management, with another $19 Billion in total consulting assets under contract.

What are we looking for?

GPA is currently seeking an **Institutional Sales & Relationship Manager** to join our team and help support GPA's rapid growth. You will be responsible for new business development and fostering relationships with existing firm clients. We are seeking candidates interested in leadership responsibilities who are passionate about helping clients and are seeking an opportunity to increase their impact while simultaneously growing their careers. You will be responsible for developing educational and comprehensive presentations and proposals, contributing to and speaking at conferences, and furthering GPA's brand and reach. Successful applicants will be self-motivated, driven to consistently exceed client expectations, and possess an in-depth knowledge of fixed-income securities and markets. You will work directly with clients to determine their needs and implement a plan to meet those needs, while helping to develop, manage, and innovate firm processes. Along the way, you will successfully manage client expectations while tactfully helping clients navigate complex situations. The role is located in Portland, is office-based with flexibility, and for employees who exceed expectations and establish themselves as leaders withing the firm, offers potential future partnership opportunities.

Key Functions and Responsibilities:

- Build and foster strong relationships with current and prospective clients by developing an understanding of their goals, portfolio requirements, and communication preferences
- Lead the development and presentation of meeting materials, review and share insights on investment policies, conduct detailed fact finding to support portfolio strategy recommendations, and ensure world-class client communication via frequent in-person and virtual meetings

- Develop and manage an active pipeline while collaborating on Requests for Proposals and business development initiatives to contribute to the firm’s growth
- Identify and develop strategic relationships with key stakeholders to establish trust while ensuring our service and portfolio strategy aligns with, and achieves, client goals
- Represent GPA at local and national industry events to enhance relationships with existing clients, create connections with new potential clients, and create visibility for the firm
- Work with internal partners to identify and execute on process improvements, client action items, and new client onboarding to ensure a positive client experience
- Educate clients on current market conditions, events, and potential investment opportunities
- Coach, develop and potentially supervise team members to enhance GPAs service and education

Requirements

- Bachelor's degree with at least 5 years of related relationship management and/or sales experience, preferably in the institutional, public entity, investment management, trust or financial services areas.
- Current and active Series 65, or candidate must obtain within 60 days of start date as a requirement of employment in this role.
- Strong knowledge of fixed income markets, fixed income investment vehicles, and money markets
- Demonstrated track record of success working in or with public entities and/or institutional investors
- Excellent verbal, written, and presentation skills and the ability to effectively tailor communication to a variety of audiences
- Proven success solving problems, managing challenging client situations, and tactfully overcoming objections
- Ability and willingness to travel up to 30% of the time to lead and participate in client meetings, events and conferences

Benefits

We believe our people are our future. GPA is an equal opportunity employer dedicated to furthering our position as a market leader by engaging, developing and investing in future leaders.

- Competitive salary based on role and experience plus discretionary bonus based on individual employee and firm performance
- Support to obtain relevant professional certifications or educational programs, such as CFA
- Medical, Dental and Vision Insurance
- 20 Days Paid Time Off in addition to 12 paid holidays
- Employee 401(k) plan