

Director, Consultant Relations

The Director, Consultant Relations will develop, expand, and cultivate Putnam's relationships with the institutional investment consultant community. Specifically within North America. As a member of the Global Institutional Distribution Team, s/he will partner with colleagues across the consultant relations, client service, business development, product management and investment teams. This position will build and cultivate productive working relationships with an existing portfolio of consultants and associated research teams in the assigned territory.

Against the portfolio and aligned with broader Putnam commercial objectives, s/he will be accountable for developing both a strategic and tactical business plan supporting the achievement of "buy" ratings across a broad range of investment strategies to attract institutional assets. This will require a comprehensive understanding of the Putnam's investment and the relevant resources that contribute to the success of the Investment Division. Further, the incumbent must possess a strong working command of the consultant market in the U.S. including the decision structures that drive and impact the research and approval processes. This role will foster meaningful dialogue with the consultant community specific to Putnam's investment capabilities and demonstrate effectiveness in securing search-qualified ratings, but also being able to have deeper conversations about problem-solving for institutional asset owners.

S/he will be responsible for proactively and collaboratively partnering with the business development team in coordinating strategy for the successful penetration of field consultants located in their respective territories. In addition, s/he will oversee the consultant communication process including RFPs, RFIs, DDQs, thought leadership and where possible thought partnership, presentation collateral, and business development databases. When possible, s/he will coordinate and manage onsite consultant due diligence visits leveraging appropriate investment and distribution resources.

As the consultant community continues to evolve, amendments to this position are possible.

Qualifications/Experience:

The ideal candidate will have a history of building strong relationships with consultants as well as a track record of helping to raise institutional assets through consultant-driven channels. The candidate will be adept at establishing priorities and maintaining focus in order to achieve results with ability to build key relationships. The candidate will possess exceptional poise, confidence and leadership characteristics with a strong results-driven orientation that inspires trust and confidence among colleagues, clients and external partners. The ideal candidate will contribute and succeed in the "rebuild" story with Putnam.

The successful candidate will:

- Have leadership presence and ability with 7-10+ years of client/consultant-facing experience with a proven successful track record of helping to raise institutional assets and building relationships with the consultant community.
- Have experience with a multi-faceted range of institutional asset management strategies (traditional and alternative) with the ability to speak cogently across different strategies.
- Be confident/self-assured as well as credible
- Possess an entrepreneurial spirit along with the ability to be “thoughtfully persistent” and work effectively to build consensus
- Be high energy, focused and strategic
- Possess very strong verbal and written communication skills, including ability to develop positioning points and influence decision-makers with strong persuasive presentation skills
- Be a quick learner and thinker who is creative, flexible, open-minded and a strong new idea generator. Have an enthusiastic, proactive attitude with ambition to take on new challenges.
- Possess a strong intellect and high level of emotional maturity; be an inquisitive and independent thinker.
- Exhibit honesty and unfailing integrity
- Be visible within the consultant community to drive new business; have a strong commercial orientation; be both business driven and client-focused; have knowledge and appreciation for various institutional sales strategies for different types of plan sponsors.
- Possess sophisticated investment, financial, and distribution acumen, known for delivering results against objectives
- Collaborate, communicate, coordinate, and cooperate in the utilization of all Putnam-wide resources.
- Have dexterity with Salesforce
- MBA/CFA/CAIA preferred
- FINRA Series 7 and 63 licensing preferred

Milena M. Humplik, *Managing Partner*

Broad Street Consulting Group

mhumplik@broadstreetconsulting.com

(617) 869-8937

Margot DeMore, *Managing Partner*

Broad Street Consulting Group

mdemore@broadstreetconsulting.com

(617) 733-0585