

Title
Sales Assistant

Location
Madison, WI

Classification
Full-Time

Background

Founded in 1974, the Madison Investments organization has grown into a nationally recognized asset management firm that manages client assets across a suite of mutual funds, managed accounts, and customized portfolios. Our highly credentialed investment professionals 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 on the Madison Investments organization, please visit www.madisoninvestments.com

Position Description

Madison Investments is seeking a hardworking and versatile individual to serve as a Sales Assistant within its Business Development Team. This position will report to the Firm's Strategic Account Manager.

Duties

- Supporting the Account Managers who are working with the firm's top customer relationships.
- Running sales and asset reports used across the team and the firm.
- Maintaining the Contract database
- Working with Account Managers to complete client due diligence requests and assisting with new business RFPs
- Updating third-party investment databases with characteristics/statistics of the Firm's investment strategies.
- Working closely with members of the Firm's Business Development Team to complete all necessary client requests.
- Assists in the maintenance of the proposal database
- Helping to maintain and update the firm's CRM

Required Qualifications:

- Ability to manage multiple priorities while collaborating with others in an extremely deadline driven business
- Excellent verbal and written communication skills
- Knowledge of Microsoft Office Suite with a focus on Excel

Position Demands:

- Extended hours required during peak workloads or special projects typically at quarter end
- This position works in an office setting

Benefits

- Comprehensive Benefits and Perks: health insurance and profit sharing
- Company Culture: collaborative, team-oriented, fast-paced, challenging and innovative
- Professional Development: training, cross-functional project opportunities

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