

COMMUNITY CAPITAL MANAGEMENT, LLC

JOB DESCRIPTION: CLIENT PORTFOLIO MANAGER (BUSINESS DEVELOPMENT)

LOCATION: FORT LAUDERDALE, FL or REMOTE

START DATE: IMMEDIATE

Community Capital Management, LLC ("CCM"), a leading fixed-income impact investment manager, is hiring a Client Portfolio Manager to join the distribution team in Fort Lauderdale or remotely. Seeking a motivated candidate to grow assets, generate leads, acquire clients, develop Salesforce CRM, handle inquiries, and engage with clients/prospects.

The Client Portfolio Manager (CPM) will focus on building sales momentum and providing client service support for mutual funds, ETFs, and separately managed accounts within a specific territory. Primary responsibilities include working directly with intermediaries, such as financial advisers and institutional consultants to cultivate relationships, deliver sales presentations, and offer superior client service.

The CPM will actively engage in outreach efforts, both through phone calls, emails, in-person meetings and conference attendance. They will educate prospective clients about the features and benefits of CCM products as well as address any inquiries or concerns. Additionally, the CPM will identify new sales opportunities and contribute to the launch of new products or marketing campaigns.

In addition to their direct client interactions, the CPM will support the distribution and marketing initiatives of the organization. This may involve collaborating with other members of the distribution team, maintaining knowledge of assigned territories, investment products, and ongoing marketing campaigns. The CPM will also proactively seek new business opportunities wherever possible.

Overall, the CPM plays a crucial role in driving sales, maintaining client relationships, and supporting the business development efforts of CCM.

Primary responsibilities:

- **Prospect and Drive Sales:** The CPM will actively seek out and pursue sales opportunities at various financial institutions, including wirehouses, independent registered investment advisers (RIAs), broker/dealers, and other relevant entities. This involves identifying potential clients and engaging in sales activities to promote CCM products.
- **Target Larger Distribution Opportunities:** The CPM will focus on identifying and targeting larger distribution opportunities within their assigned territory. This entails recognizing potential clients or channels that can significantly impact sales growth and prioritizing efforts towards capturing those opportunities.
- **Maintain Product Knowledge:** The CPM is expected to possess a high level of product knowledge. This knowledge empowers financial advisors and clients, enabling them to make informed investment decisions. Staying updated on product features, performance, and industry trends is crucial in delivering value-added support and guidance.
- **Utilize Salesforce CRM System:** The CPM will utilize the Salesforce Customer Relationship Management (CRM) system to execute their business plan effectively. This involves leveraging CRM functionalities to manage and track relationships, opportunities, and activities, ultimately fostering new connections and providing exceptional customer service.
- **Conduct Meetings:** The CPM will conduct meetings of various types, including webinars, group sessions, seminars, one-on-one meetings, and conferences. These meetings serve as platforms for presenting CCM products, addressing



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client needs, providing education, and building relationships with financial advisors and clients.

- Attend Industry Conferences: The CPM will participate in industry conferences relevant to their target market. This involvement offers opportunities to network, stay updated on industry trends, and coordinate group or one-on-one meetings with prospects or existing clients.
- Travel: The CPM will travel at least one to two times per month to visit prospects and/or clients within their assigned territory. Face-to-face interactions are valuable in establishing and nurturing relationships, understanding client needs, and providing personalized support.

Qualifications:

- At least 3 years of distribution experience, preferably at an asset management firm
- Undergraduate degree
- Strong knowledge of fixed income investments
- Strong communication skills including the ability to deliver persuasive, concise, and well-organized presentations and messages
- Ability to create, build and maintain relationships with financial advisors and other intermediaries in a fast-paced environment with a high level of professionalism
- Excellent listening skills as well as the ability to identify opportunities and suggest creative solutions
- Strong time management and organizational skills
- Ability to thrive in an independent, challenging, and collaborative sales environment
- Possess understanding of investment fundamentals (capital markets, modern portfolio theory and asset management performance analysis)

For consideration, please send cover letter and resume to jobs@ccminvests.com; reference “Client Portfolio Manager” in the subject line.

