Title: ETF Client Associate  
Business Unit(s): U.S. Sales  
Department: Internal Sales (Dept 26)  
Reporting to: Internal Sales Manager  
Location: Tampa, FL or New York, NY  
FLSA Status: Full-Time Exempt

Summary: The ETF Client Associate, in conjunction with the Regional Vice Presidents, is responsible for the sale of ETFs.

The ETF Client Associate, in conjunction with the Regional Vice Presidents, is responsible for the sales of ETFs in both the RIA and the Asset Manager channel. In addition to supporting the efforts in the RIA channel, the ETF Client Associate will be responsible for uncovering and managing opportunities in the Asset Manager channel through prospecting and profiling potential clients.

Essential Duties and Responsibilities:

Includes the following; other duties may be assigned as needed:

- Analyze competitive landscape and portfolio characteristics across strategies for the purposes of product onboarding, research advocacy and firm discretionary model placement in partnership with Portfolio Management and Product Management
- Research mentality and approach to territory
- Effectively support a territory rotation
- Profiling contacts in order to uncover needs and recommend appropriate solutions across ETF product lines.
- Conduct research and engage in calling efforts on Asset Manager’s in support of the direct sales and service effort.
- Track inflows and outflows on a daily basis, to be reported monthly in summary form.
- Respond to client or prospect inquires.
- Preparation of pre/post meeting needs for Asset Manager and RIA channel.
- Support for conferences and sponsorship planning and follow-up
- Compile sales opportunity data using Salesforce, Whale Wisdom and Broadridge
- Contribute to the maintenance and improvement of the firm’s Client Relationship Management (CRM) system
- Participate in client and prospect meetings, initially with a senior member of the team.
- Become an expert in ETF markets and product technical analysis

Qualifications:

- Proficient in Microsoft Office
- Experience leveraging tools such as: WhaleWisdom, PowerBI, Y-Charts, Eikon, Morningstar®
- Strong quantitative analytics skills
- Effective presenter both orally and in written form
- Detail-oriented with strong organizational and follow up skills
- Ability to work independently and manage/prioritize multiple projects
• Team-player attitude and a desire to work on a wide range of projects
• Strong presentation skills
• Time management skills
• Consultative selling skills
• Broad ETF and Market Knowledge
• Ability to Leverage internal resource personnel (product management, product specialists)
• Client management skills
• Ability to work in office a minimum of 4 days per week.

**Supervisory Responsibilities:**

This job has no supervisory responsibilities.

**Education and/or Experience:**

• Bachelor degree with a business-related concentration preferred.
• 2+ years asset management, sales or analyst experience
• Series 7 and 63 licenses

**Competencies:**

To perform the job successfully, an individual should demonstrate the following competencies:

• Professional demeanor
• Capacity for learning new procedures/ideas
• Motivation
• Enthusiasm

**Language Skills:**

• Ability to effectively present information in one-on-one and small group situations to customers, clients, and employees of the organization.

**Compensation:**

• If this position will be performed in whole or in part in New York City, the base salary range is $70,000 to $75,000. Individual salaries may vary based on different factors including but not limited to, skills, experience, job-related knowledge, and location. Base salary does not include other forms of compensation or benefits offered in connection with this position.

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