

SALI Fund Services
Director, Business Development

Firm Summary:

Founded in 2002 and based in Austin, TX, SALI Fund Services (“SALI”) provides a turn-key solution for the creation and administration of Insurance Dedicated Funds (“IDFs”). SALI administers IDFs for a broad range of alternative asset managers, from boutique hedge funds to the largest wealth management institutions in the world. Currently, SALI manages over 120 separate IDFs with over \$10 billion of assets under management.

SALI enables investment managers to create tax compliant IDFs which can be attached to insurance company Private Placement Variable Annuity and Private Placement Life Insurance investment account platforms. On an ongoing basis, SALI serves as the fund administrator to the IDF.

Position Summary:

SALI is seeking a Director of Business Development to work alongside our Chief Marketing Officer. The Director will help to expand the reach of SALI’s Marketing functions by building and maintaining relationships with various market participants, including referral sources and distribution channels. The role will consist of work related to both Marketing and Investor Relations. The individual will need to have conversational knowledge of various investment strategies. The preference is for this individual to be based in Austin, TX and will require the Director to travel within the U.S. approximately 10+ days per month.

Our ideal candidate is highly motivated, extremely organized, and exceptionally detail-oriented. The candidate is able to work effectively with a team or independently, but always maintain a team-player mentality. As a Director-level employee, this individual will exceed expectations in representing the firm professionally with internal and external contacts.

Responsibilities:

- Build new and maintain existing relationships with insurance brokers, bank platforms, and other potential referral sources/COIs (e.g., financial advisors, third party marketers, and private wealth advisors) through in-person meetings
- Be well versed in the investment vehicles available on the SALI platform, as well as those strategies that are in development
- Utilize various marketing tools to speak articulately about the various investment strategies and their value proposition at a high level
- Act as a key point of contact for parties that currently, or are interested in starting to, distribute and/or allocate to insurance dedicated funds
- Act as a key point of contact for investment managers interested in the insurance-dedicated fund space
- Proactively call on insurance brokers and other potential referral sources/COIs (e.g., financial advisors, and private wealth advisors) to make them aware of the existing strategies on the SALI platform, and identify new insurance-dedicated fund opportunities

- Assist in the coordination of all marketing efforts for the SALI platform including events and conferences as well as market education and outreach (e.g., insurance brokers, MFOs, RIAs, investment managers, private banks, and wirehouses)
- Coordinate joint marketing efforts with third parties (e.g., investment managers, insurance brokers, and insurance companies) including both regional events and “roadshows” with investment managers
- Assist with fielding and vetting inbound calls and inquiries
- Work closely with the Chief Marketing Officer as an internal partner assisting with the tracking of all leads and high-level project management and monitoring
- Work across SALI departments including the fund development, client services, and operations teams on ad hoc projects, marketing materials, etc.

Desired Skills and Experience:

- 3-5 years of alternative investment experience
- BS/BA degree required
- Completion of or progress toward CFA/CAIA is a plus
- Mid-level knowledge of various alternative investment strategies (e.g., hedge funds (equity and credit), private equity, private credit, private real estate, managed futures, and other alternative investment strategies)
- Excellent communication and listening skills a must, including the ability to explain complex information in a concise manner and the ability to make effective presentations
- Prior experience working in wealth management or financial services (focus in marketing and sales a plus)
- Knowledge of Excel, PowerPoint, and Salesforce

Compensation/Benefits:

- Annual compensation package is commensurate with experience
- Comprehensive benefits package includes medical, life, disability, 401(k), Flexible Spending Account, Profit Sharing, and other voluntary benefits

Please send a cover letter with salary requirement and resume to hr@sali.com