BRIDGEWAY CAPITAL
MANAGEMENT JOB DESCRIPTION
Director of Institutional Sales and Client Relations

Bridgeway Capital Management
Bridgeway Capital Management is a Houston-based investment management firm founded in 1993. We believe our strong and principled organizational culture and our disciplined investment process allows us to deliver innovative investment solutions to institutions, advisors, and individuals. At all times, Bridgeway strives to put investors' interests first by emphasizing integrity, performance, efficiency, and service. Bridgeway is a leader in relational investing, which unites results for investors with returns for humanity. Our approach to investing is statistical and evidence-based, motivated by a passion for servant leadership and global impact, which we accomplish by donating 50% of our firm's earnings to organizations that positively impact humanity. Based on the evidence, we firmly believe that diverse and inclusive teams and organizations make better decisions and achieve better outcomes.

The Director of Institutional Sales and Client Relations is responsible for proactively leading client/prospect meetings and communications resulting in investment strategy sales and client retention. Bridgeway is looking for a professional to accelerate asset growth. The professional in this role will strengthen Bridgeway's relationship with existing and prospective clients by developing and executing proactive, creative, and ongoing contact initiatives that increase understanding among clients/prospects of Bridgeway's investment capabilities. The professional in this role will be responsible for growing all aspects of Bridgeway's selling and serving as the relationship manager to a specific subset of the marketplace. The focus areas are in the endowment, foundation, OCIO, Family Office, and Alternative consultant areas. This individual should have significant experience selling and servicing into this market with both long only and alternative strategies. This role includes working closely with the Client Service and Marketing team providing leadership and support in marketing projects as needed. This individual will be a critical member of Bridgeway's Client Experience team.

Candidates must possess the experience and expertise needed to perform the following principal responsibilities:

- Develop and execute a national comprehensive calling program.
- Represent Bridgeway strategies, philosophy, and process to the institutional investment marketplace.
- Represent Bridgeway at appropriate industry conferences.
- Establish, maintain, and nurture client relationships on behalf of Bridgeway.
- Conduct meetings throughout the U.S., independently and with portfolio managers.
- Relate back to Client Service and Marketing and Investment Management team trends in the marketplace to include recommendations for thought leadership topics.
- Align institutional client and asset growth with overall firm goals and resources.
- Identify and deploy appropriate internal resources required to broaden sales effort and drive client growth.
- Develop a sales and service model that aligns client needs with company and individual goals.
- Coordinate all client/prospect interactions with internal staff and third parties to ensure quality timeliness and cost efficiency.
- Coordinate and participate in new business finals presentations.
- Negotiate terms for new client asset transitions.
- Manage new client asset transitions.
- Manage client relationships including day-to-day support and regular formal and informal meetings and entertainment.

Skills/Passions:

- High energy: drive for success that parallels the culture of Bridgeway.
- Demonstrated passion for community impact and improvement.
- Strong long-term relationship builder.
- Ability and most of all desire, to be a team player along with the drive to compete.
- Flexible and responsive to multiple and changing priorities.
- Proven negotiation skills with the ability to close business.
- Focused, result-driven, and goal oriented even through adversity.
- Positive desire for ongoing personal and professional development.
- Working knowledge of all aspects of relationship management with depth in one or more areas.
- Familiarity with client reporting and ad-hoc reporting.
- Sense of urgency, attention to detail, highly organized, and strong project management skills.
- Ability and interest in frequent travel.

Education:

- CFA designation and/or MBA with emphasis in finance, investments, or economics strongly preferred.
- FINRA 7 and 63.

Experience:

- Must have established contacts with national and regional investment consulting firms and institutional investors. Requires detailed knowledge of institutional client plan structures, asset allocations, and investment vehicles; with at least 10 years of experience.
- Must have demonstrable experience in successfully building and managing a wide variety of relationships with clients, consultants, and other service providers.
- Candidate should have excellent written and verbal communication skills needed to explain complex investment concepts and portfolio management strategies to investment committees, staff, and consultants with varying degrees of investment knowledge and sophistication.
- The ability to be consultative and client-focused, as well as result-driven is necessary, along with an "aggressively humble" approach to the role.
- The ideal candidate will have an in-depth understanding of quantitative investment strategies.