BRIDGEWAY CAPITAL MANAGEMENT
JOB POSTING: SALES AND MARKETING ANALYST

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 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 profits to organizations that positively impact humanity. Collectively, we continuously work to sustain a workplace environment that brings out the best in all of us, that supports diverse and inclusive teams that achieve better outcomes.

Purpose

The Sales and Marketing Analyst will be involved in multiple phases of the sales process, including research, marketing, client communications, due diligence and relationship management support across various strategies. This role reports to the Distribution, Client Service and Marketing Team Leader.

Principal Responsibilities

- Provide administrative and general sales support that enables sales representatives to pursue new business
  - Follows up on sales calls, answers product questions, provide performance data
  - Utilizes and updates SalesForce (CRM) in support of sales efforts
  - Updates search databases and due diligence questionnaires
- Support production of marketing material with internal staff and third parties
  - Prepares materials to deliver to prospects and clients in support of external sales staff
  - Conducts marketing research
- Lead new client onboarding processes.
- Manage client activity and reporting with internal teams
  - Provides performance data and preparing analytical materials used in client reviews
  - Ensures timely delivery of client reports.
- Coordinate conferences and client and prospect meetings.

Qualifications

Experience/Education

- 2-3 years of relevant experience in the investment management industry.
- Bachelor's degree in a related field (BBA, finance, marketing, communications, etc.).
- Proficient in Microsoft Office; Salesforce experience is a plus.
- Series 7 and Series 63 FINRA licenses required.

Skills and Attributes

- Excellent interpersonal, analytical, and problem-solving abilities.
- Strong written and verbal communication skills, including presentation preparation and delivery.
- Self-motivated with high attention to detail.
- Ability to multi-task and work in a fast-paced, team-oriented environment.
- Proactive approach to work and willingness to take on challenging projects.
- Ability to build and maintain internal and external relationships.
- Team player with a positive attitude.
- Flexible and responsive to changing priorities.
- Desire to work in a Servant Leadership culture.
- Strong desire for personal and professional development.