

# Inside Sales Representative – Private Bank

## Overview:

TriState Capital is seeking an Inside Sales Representative to broaden our existing client relationships and seek new business opportunities in a defined geography while working from our Pittsburgh offices. Successful candidates will proactively contact financial advisors to assist them in implementing TriState Capital Bank strategies, in particular the Bank's securities-based loans. ISR's also act as the critical link between resources available at the corporate offices of TriState and their external sales partners towards the achievement of sales goals.

## Company Description:

TriState Capital Holdings, Inc. (NASDAQ: TSC) is a bank holding company headquartered in Pittsburgh, Pa., providing commercial banking, private banking and investment management services to middle-market companies, institutional clients and high-net-worth individuals. Its TriState Capital Bank subsidiary had \$4.7 billion in assets, as of December 31, 2017, and serves middle-market commercial customers through regional representative offices in Pittsburgh, Philadelphia, Cleveland, Edison, N.J., and New York City, as well as high-net-worth individuals nationwide through its national referral network of financial intermediaries. Its Chartwell Investment Partners subsidiary had \$8.3 billion in assets under management, as of December 31, 2017, and serves institutional clients and TriState Capital's financial intermediary network.

## Essential Tasks include:

- ✓ Collaborate with external sales partner / sales management in creating and implementing a business plan to expand our relationship with existing clients (financial advisors).
- ✓ Collaborate with external sales partner / sales management in creating and implementing a business plan for identifying potential new clients (financial advisors).
- ✓ Take the lead on certain aspects of the business plan, while also managing the follow-up for the efforts of external sales partner.
- ✓ Analyze each step of the sales process so as to have a keen awareness of progress towards defined goals.
- ✓ Oversee the interaction of other TriState professionals with our clients and prospects.
- ✓ Present all of TriState's product offerings to our clients to help them understand how we complement their business.
- ✓ Manage internal and external pipeline to generate mutual fund and separate account sales by working with external sales partner, service team specialists, and portfolio managers.

## Preferred Qualifications:

### Education/Training:

Bachelor's Degree in financial related discipline.

### Experience:

1-3 years of financial services experience, including previous experience in financial sales or client services with demonstrated achievement of goals.

### Skill/Abilities:

Excellent communication and interpersonal skills. General knowledge of mutual funds and separately managed accounts a plus.

#### Other:

- ✓ Entrepreneurial : Willingness to make independent decisions and improve processes that contribute to the territory business objectives
- ✓ Creativity: Develops innovative ways to demonstrate to our clients best practices in implementing Tristate strategies and help them identify investment opportunities
- ✓ Competitiveness: Motivated by being in a professionally competitive atmosphere
- ✓ Curiosity: Interested in understanding capital markets and how individual investors utilize asset management/banking products to achieve their financial goals
- ✓ Ethical: Unwavering commitment to doing what is right for the client and for the company

#### Compensation:

Competitive base salary, bonuses based on achievement of goals, and comprehensive benefits package to include 401(k) plan.

**TriState Capital Bank is an Equal Opportunity Employer**