



## Client Relations Associate

### Firm Summary

SouthernSun Asset Management, established in 1989, is a research-driven investment management firm implementing U.S. Small Cap Equity and SMID Cap Equity investment strategies. We manage assets for high net-worth clients, public pensions, unions, nonprofits, and corporations.

We believe our greatest assets are our people, so we believe that excellence in execution and a healthy organization are inextricably linked. Our firm seeks to attain superior long-term returns for our clients, outstanding client support, seamless error-free operations, a culture of compliance, and a healthy and inclusive work environment for our employees. Additionally, we are actively engaged, individually and corporately, in the Memphis community—working to help our city thrive. Our goal is a healthy and inclusive work environment for our employees. We want our employees to be lockstep in their desire for SouthernSun to excel as an investment management firm.

Therefore, we adhere to the following Core Values:

- *Entrepreneurial*: We foster initiative, strive to be thoughtfully adaptive, and take calculated risks within our boutique environment.
- *Problem Solving*: We use our analytical skills combined with the commonsense intuition of “generalists” for decision making throughout the organization.
- *Relational*: We believe in the value of building relationships that are intentional and lead to positive, healthy, and respectful interactions.
- *Community Centric*: We are mindful that we are part of a larger community, and we work to be a good neighbor.

SouthernSun is overseen by a Management Team that sets strategic direction for the firm. In addition, the Management Team seeks to provide clarity by building trust, resolving conflict, achieving commitment, requiring accountability, and driving results. We strive to accomplish our objectives and strategic direction by establishing specific goals for each team, focusing on professional development, providing appropriate incentives, and making diversity/inclusion an important aspect of our firm. In addition, we have community centric activities to educate and engage our employee base as well as opportunities for wellness and healthy living. Finally, we review each employee’s results in several areas throughout the year and then via a self-assessment at each year-end.

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## Job Description

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This position will support the Client Relations Team in all functions including client reporting, consultant database population, advertising materials production and investment data maintenance. This position will gain valuable exposure to the sales and marketing side of the investment management industry.

## Requirements

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- Bachelor's degree in Marketing, Communication, Finance or a related field is preferred
- Proficient in Microsoft Excel, Outlook, Word, PowerPoint and InDesign
- Strong quantitative and analytical skills
- Excellent project management and organizational skills, with the ability to manage multiple tasks and meet strict client-oriented deadlines
- Desire to work in a collaborative, team-oriented environment

## Key Responsibilities

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- Prepare PowerPoint presentations for sales and client service meetings
- Make updates to existing and prepare new marketing materials, which includes monthly and quarterly presentations, fact sheets and commentaries
- Coordinate completion and assembly of marketing materials
- Liaise with the team to create and maintain updated client presentation slides
- Coordinate and prepare marketing materials for conferences
- Assist in monthly and quarterly client reporting for institutional clients and consultants
- Assist in the completion of RFPs (Request for Proposals) and databases for new client accounts and existing consultant relationships
- Support marketing with campaign management activities
- Update, verify and upload list data for email campaigns
- Proactively provide sales and client relations support
- Support additional client service and marketing projects, as needed

Qualified applicants should submit their resume to Samantha Gould at [sgould@southernsunam.com](mailto:sgould@southernsunam.com).