

**Grantham, Mayo, Van Otterloo & Co. LLC (“GMO”)
North American Global Client Relations
Business Development Relationship Associate**

Interested candidates should apply on GMO’s [website](#)

Company Profile

Founded in 1977, GMO is a private partnership committed to delivering superior investment performance and advice to our clients. We offer strategies where we believe we are positioned to add the greatest value for our investors. These include multi-asset class portfolios as well as dedicated equity, fixed income, and absolute return offerings, many of which employ the firm’s proprietary 7-year asset class forecasting framework. Our client base is comprised primarily of institutions, including corporate and public defined benefit and defined contribution retirement plans, endowments, foundations, and financial intermediaries.

GMO, whose sole business is investment management, employs approximately 470 people worldwide and is headquartered in Boston with offices in San Francisco, London, Amsterdam, Sydney, and Singapore. We manage roughly \$70 billion in client assets using a combination of top-down and bottom-up approaches that blend traditional fundamental insights with innovative quantitative methods to identify undervalued asset classes and securities. Our valuation-based approach embeds several key factors, including: a long-term investment horizon, discipline, conviction, and a commitment to research. Our research emphasizes not only identifying and exploiting pricing dislocations but also understanding the long-term drivers of return in the markets in which we invest. We are known for our candor in sharing our views with clients and for our willingness to take bold, differentiated positions when opportunities warrant.

Position Overview

The role of a Relationship Associate (“Associate”) is to serve as a direct and dedicated resource for the North America Business Development Team.

The Associate will work under the direct supervision of the regional team leader and their assigned regional team members.

Responsibilities Include:

Assist Business Development Managers and Team Leader in

1. Increasing the # of high-quality prospect touch points (meetings, calls, events)

- Prospect lists
 - Maintain current prospect list in CRM and outside of CRM including tags which identify areas in which the prospect is interested
 - Increase prospect list (using databases such as Broadridge, as well as inbound emails through the web)
- Distribution lists
 - Utilize prospect list to build distribution lists for virtual events, email campaigns, and other distributions
- Emails to increase # of touch points. Assist with:
 - Personalized emails to prospects
 - Writing template emails
 - Using mail merge to send semi-customized emails to distribution list
 - Email responses and getting meetings/calls scheduled & prospects to attend events

2. Increase Quality of meetings and events

- Own meeting logistics
 - Calendar invitations and logging to CRM
 - Prep notes
 - Presentation materials (soft and hard copies where applicable)
- Own meeting preparation, prep notes to include:
 - Presentation materials
 - Prospect information: research most applicable information on prospects in advance of calls using prior notes from pivotal, web, and databases such as Dakota, Broadridge and Market Lens
 - Competitor information:
 - Help reaffirm our key competitive advantages vs. competition in key strategies
 - Custom competitive analysis in excel to help show how our strategy complements other strategies
- Assist in organizing GMO specific investor and marketing events in North America

3. Translate prospect touch points into business

- Meeting notes
- Translate meeting to prospect list tag (e.g. tag someone interested in EMD that comes up in a meeting)
- Meeting follow-ups (from seismic, website, etc.)
- Proactively and systematically build procedure for reaching back out to prospects who we have met who have not yet made a decision

Other:

- Develop a thorough understanding of GMO's policies and procedures in order to help facilitate the efficient delivery of information and services to GMO's prospect community
- Work with GMO's team of investment professionals independently and at the direction of the team leader to ensure prospects experience the highest level of satisfaction from GMO
- Collaborate with various groups across GMO including: Graphics, Operations, Performance, Investment teams, Shareholder Services, RFP, as well as Tax, Legal and Compliance
- With time, understand and articulate GMO's investment strategies, philosophy and process
 - Identify prospective clients of competitors that should be included in our business development plans

Required Skills:

- At least 2 years of experience in the investment management business
- Bachelor's Degree (or equivalent)
- Strong ability to create, operate, maintain and organize databases
- Proficient in MS Excel and other Microsoft applications
- Excellent written and verbal communication capabilities
- Strong organizational skills and attention to detail
- Strong analytical skills
- Demonstrated understanding of investment strategies and markets, including fixed income, equity and alternatives
- Some basic knowledge of the North American asset management industry
- Previous experience working with Salesforce or another CRM preferred

Character:

- High level of detail orientation and proactiveness
- High energy, positive attitude, professional and mature
- Comfortable working both independently and as part of a team
- Ability to prioritize multiple tasks, set goals and meet deadlines
- Self-directed and motivated
- Willing to roll up sleeves and get things done
- High degree of intellectual curiosity
- Ability to professionally represent GMO and perform consistent with the firm's values