

## **Director of Institutional Client & Consultant Relations Position Punch & Associates Investment Management, Inc. Minneapolis, MN**

### **Company Profile**

Punch & Associates Investment Management, Inc. (Punch) is a Minneapolis-based, independent wealth and investment management firm. We serve institutional and private clients through investment management and advisory services. Our mission is to enable families and institutions to steward resources with clarity and purpose.

### **Position Summary**

The Director of Institutional Client & Consultant Relations will be responsible for managing Punch's existing relationships with all institutional stakeholders as well as sourcing and developing new relationships. In this capacity, he/she will lead and work collaboratively with Punch's investment, advisory, and administrative team members.

### **Responsibilities**

Responsibilities include, but are not limited to:

- Maintain relationships with existing institutional stakeholders
  - Provide regular investment reporting and updates for clients and consultants
  - Coordinate and manage regular in-depth meetings and presentations
  - Maintain a detailed understanding of client portfolios, holdings, performance, and capital needs
- Source and develop new client and consultant relationships
  - Implement and lead a comprehensive marketing and communications program
  - Introduce Punch and its philosophy, process, investment strategies, and professionals
  - Maintain regular contact and foster relationships with key professionals at endowments, foundations, family offices, pensions funds, consultants, and other professional organizations
  - Coordinate and manage requests for proposals and presentations to institutional staff and board members
- Provide internal feedback and guide team members to improve communications
- Work with Punch's investment professionals to consider and launch new investment strategies that align with its existing investment philosophy and process

## Personal and Professional Characteristics

- Alignment with the firm's stated values: aiming past the target, diligence and persistence, humility, building the firm for permanence, and making the firm a fun place to work
- Ability to communicate complex ideas in a simple, straightforward, and understandable manner
- Desire to provide superior customer service with an extreme attention to detail
- Ability to present confidently in front of large groups
- A willingness to work both collaboratively and independently with significant latitude to implement best practices as you see fit
- Demonstrated professional experience in the area of institutional relationship management
- Excellent interpersonal and relational skills
- Positive, collaborative, and productive communication style
- Exceptional organizational skills
- Entrepreneurial mindset with a strong sense of ownership and accountability

## Minimum Qualifications

- An undergraduate degree from an academically reputable institution
- Exceptional written and verbal communication skills and experience working with a broad range of constituencies
- Proven leadership with the ability to manage individuals in a cohesive team environment
- Regular (monthly) travel is required (as conditions demand)

## Preferred Qualifications

- CFA Charterholder
- Minnesota-based

## Compensation and Benefits

- Base salary with strong incentive compensation for net new assets to the firm
- Generous benefits package including:
  - Firm-paid premiums for medical, dental, vision, and LTD insurance plans
  - Generous vacation and sick leave
  - Retirement plans, including a 401(k) plan with a match as well as a profit-sharing plan
  - Hybrid work environment after onsite onboarding and initial firm and team cohesion is complete

## Application Instructions

Please forward resume to Julie Boehmke, Director of Administration, at [resumes@punchinvest.com](mailto:resumes@punchinvest.com). Please include a cover letter explaining why you are interested in this position.