



Dean R. Anderson  
Managing Director  
San Francisco, CA: 415-342-7537  
dean@gaiahumancapital.com  
Skype: deanrobertanderson

July 2011

## Managing Director – Head of Institutional Sales

**Location:** Open

**Preferences:** Seattle; San Francisco; New York City; Boston; London

### Company Overview:

Our client is an entrepreneurial research-driven equity manager that has led development of best of class style of sustainability theme investing in the US. The firm manages mandates for institutional investors such as California State Teachers Retirement System and has a pipeline of other institutions interested in sophisticated, integrative sustainable investment strategies.

Their investing strategy is based on the principle that profitable corporate financial performance correlates with superior corporate environmental management. The firm is a SEC registered investment advisor and has registered a mutual fund. In addition, they have undertaken advisory work as the founding financial advisor to Sun Edison, the world's top owner & operator of solar assets, now part of MEMC.

### Position Summary:

We seek a highly talented senior-level sales executive experienced in investment institutional and consultant-led sales processes. Required is an accomplished and senior-level asset management sales executive that will lead sales growth from <100M to \$1+ B.

The Managing Director – Head of Institutional Sales will have a huge role in growing the firm's business. This business will be built through sales activities and therefore this individual must have a successful book of business and a track record working as a principal in asset gathering firms. This individual will have relationships with and the capacity to tap manager of manager programs.

The firm has generated a 10+ year track record outperforming the S&P 500, Russell 1000, and KLD 400 with a compact staff of three. Anticipated growth is imminent upon this individual's arrival. It's expected that this individual through asset gathering activities will advance the firm to its next level.

Ultimately this individual could assume the position of President.

### Candidate Qualifications and Credentials:

#### **Experience:**

Minimum of eight – ten years in financial services industry experience

Minimum of five years of sales experience



**Education & Certification:**

Bachelor's degree. Master's or professional designation of CFA a plus;  
Series 6, 7, 63 and 65 licenses or equivalent

**Qualities & Competencies:**

- Strong sales executive leadership qualities;
- Superb understanding of the Institutional Sales cycle;
- Strong knowledge of the Investment Management Industry;
- Consultative Selling skills and strong communication and presentation skills;
- Proven record of successful sales expertise in the consultant and analyst market segment;
- Entrepreneurial spirit – needs to be able to work with a limited infrastructure and resources;
- A strong degree of integrity and an interest in advancing environmental sustainability in investing
- Self-motivated, goal setting and strategic.

**Travel Requirements:** Capacity to travel up to 50% as required.

**Compensation:** Entrepreneurial. Performance compensation and equity vesting.

**Contact Information:**

**Mr. Dean R. Anderson**  
**Managing Director**  
**Gaia Human Capital Consultants**  
[dean@gaiahumancapital.com](mailto:dean@gaiahumancapital.com)  
415-342-7537

[www.gaiahumancapital.com](http://www.gaiahumancapital.com)

**Ms. Zoe Van Schyndel, CFA**  
**Partner**  
**Gaia Human Capital Consultants**  
[zoev@gaiahumancapital.com](mailto:zoev@gaiahumancapital.com)  
786-246-7299

[www.gaiahumancapital.com](http://www.gaiahumancapital.com)



Naples, FL



New York, NY

2



San Francisco, CA



Olympia, WA