

EXECUTIVE POSITION PROFILE

Vice President, Business Practices



This search is being conducted by:

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I. Opportunity

The Investment Adviser Association (IAA) seeks a strategic, entrepreneurial leader to serve as Vice President, Business Practices. This Vice President will have the opportunity to build IAA's Business Practices program with a goal of assisting member companies to improve and expand their businesses.

Whether you are an Investment Advisory Professional, or an Association Professional, this role may be right for you! The ideal candidate will be excited by the prospect of driving significant impact across the industry and creating a plan to meet IAA's strategic goals. They will use their expertise to identify and analyze the operational needs of the industry, and create resources and forums to share knowledge and best practices across the industry.

Reporting to the CEO, the Vice President will lead cross-departmental efforts to provide member firms with resources and benefits to flourish, grow, and serve their clients.

Position Summary

This position has overall strategic and tactical responsibility for the goals, strategies, and plans for IAA's business practices program and for growing non-dues revenue. The position will be responsible for developing and implementing a comprehensive plan for building out the Association's business practices program, including vehicles for member engagement, resources to assist member firms in running and growing their businesses, and strategies to deliver value to firm personnel in various functions and to firms of different types. The position will oversee the Association's sponsor and partner relationships. This role has significant member interaction, working with a Business Programming Committee and other task forces and committees as needed.

Experience and Qualifications

- Bachelor's degree in business or related fields.
- Experience in and understanding of the financial services industry, with investment adviser/asset manager experience and knowledge strongly preferred.
- Association experience preferred.
- Demonstrated commitment to customer service and satisfaction.
- Supervisory/management experience.
- Track record in data-driven decision making.
- Demonstrated ability to plan, create, and grow new initiatives based on strategic assessment.
- Ability to be innovative and entrepreneurial.

- Ability and willingness to contribute at both strategic and tactical levels.
- Demonstrated commitment to fiscal responsibility and ability to leverage limited resources efficiently and effectively.
- Demonstrated leadership skills.

Key Responsibilities

- Develop and implement plans, based on membership and other data, to build out business practices programs and services, including professional development, events, content, best practices, thought leadership, resources, surveys, peer groups and other communities, and forums for member firm personnel.
- Develop and work with committees, forums, and/or peer groups based on segmentation strategies (other than compliance/legal groups).

- Oversee and enhance the Association's associate member program, including assessing and implementing ways to strengthen the program, grow revenue from associate members separately and/or in connection with partnerships and sponsorships, and leverage associate member activities to assist regular members and enhance member value.
- Cultivate strong Association relationships with sponsors and partners and grow sponsor/partner revenue; this includes supervising the Manager, Marketing & Partnerships and overseeing and managing existing strategic partnerships and seeking new potential long-term or short-term strategic partnerships.
- Plan content, format, and speakers for leadership conference, as well as business practice meetings, roundtables, webinars, and other events in collaboration with events, marketing, communications, and other IAA staff.
- Communicate and collaborate effectively with the Board, committees, and senior executives within the investment advisory community, including a Business Programming Committee.
- Collaborate as a member of the association management team to achieve the mission and goals of the Association, including annual budgeting, strategic planning, and thought leadership; work collaboratively with teams across the organization.

- Assist the President & CEO in operating the Active Managers Council, and lead/execute various special strategic initiatives as assigned.
- Perform other activities as assigned by President & CEO.

Interpersonal Skills and Qualities

- Excellent relationship-building and interpersonal skills
- Ability to relate well with a wide range of constituencies
- Strong verbal and written communications skills
- Possesses highest integrity, ethics, and good judgment
- Has strong desire to serve needs of IAA members
- Has ability to work proactively and effectively
- Has high-energy, strong work ethic, and motivation
- Possesses a positive, "can-do" attitude
- Collaborative team player
- Maintains professional rapport with all members of the IAA staff and external contacts

II. Organizational Overview

The Investment Adviser Association (IAA) is a not-for-profit organization that exclusively represents the interests of SEC-registered investment adviser firms. The Association was founded in 1937 as the Investment Counsel Association of America. Its name was changed to the Investment Adviser Association in 2005.

The Association played a major role in the enactment of the Investment Advisers Act of 1940, the federal law regulating the investment adviser industry. Today, the IAA's growing membership consists of more than 650 firms that manage \$25 trillion in assets for a wide variety of clients, including individuals, trusts, investment companies, private funds, pension plans, state and local governments, endowments, foundations, and corporations.

Purpose Statement

To serve the interests of the SEC-registered investment advisory profession.

Mission Statement

To be the leading industry organization:

- Promoting high standards of fiduciary duty, integrity, public responsibility, and competence in the investment advisory profession.
- Providing effective, quality representation of the investment advisory profession with respect to the development, formulation, and enactment of legislation, regulations, and other policies relating to investment advisers.
- Offering benefits, services, and resources that assist and add value for member firms.

Service and Excellence

The Association provides various services and benefits to its membership, including representing the interests of investment advisers before the U.S. Congress, the Securities and Exchange Commission, the Department of Labor, state securities commissions, and other governmental entities on issues affecting its membership and the investment advisory profession.

Digital Presence

Website: investmentadviser.org

LinkedIn: [@investment-adviser-association](https://www.linkedin.com/company/investment-adviser-association)

Twitter: [@IAA_Today](https://twitter.com/IAA_Today)

YouTube: [Investment Adviser Association](https://www.youtube.com/InvestmentAdviserAssociation)

III. About Vetted Solutions

Vetted Solutions is a Washington, D.C. based executive search firm specializing in association, nonprofit, and hospitality/destination marketing community recruiting and consulting. We focus on senior staff and CEO positions. For confidential consideration, please email your resume and cover letter to IAAVPBusinessSearch@vettedolutions.com or contact Vetted Solutions at +1 202 544 4749.



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