

Conquest Planning endeavors to improve the speed, individualization, accuracy and ongoing evolution of modern financial plans to fit every family's financial needs across life's twists and turns. We leverage Artificial Intelligence (we call it SAM) to deliver personalized and prioritized financial planning strategies that will help financial advisors and their clients see what possibilities exist for their financial future. We believe a goals-based approach to financial literacy, delivered through a human centered digital experience, will increase the number of people who can benefit from financial advice. We were founded in Canada in 2018 and went live to market in January of 2021. Since that time, we have become the dominant software provider for financial advice delivery in Canada and we aim to replicate that success in the US. Conquest serves the entire wealth continuum – from simple to complex. We have team members located across Canada, the United States, and the United Kingdom.

We are seeking an experienced **Strategic Account Manager – US** to join our Strategic Accounts team. This is a **remote** / work from home opportunity based in the United States.

Reporting to the Vice President, Strategic Accounts, the **Strategic Account Manager** is responsible for driving revenue growth, adoption and retention within our existing client base. The successful candidate will be well-versed and comfortable working with senior decision makers as well as groups such as Technology, Advisor Experience, Advisor Operations and Digital Advice. You will also interface and collaborate internally with stakeholders in Product, Support, Delivery, Sales, and Finance as part of the account growth strategy within our existing clients. As important, client retention will be accomplished by supporting them to leverage Conquest Planning's software to achieve their business plans by developing their technical and business expertise.

In this role you will:

- Be the main point of contact for Conquest at named enterprise accounts that have been designated to you.
 - Uncover, qualify and close new opportunities within your account base
 - Generate and maintain a consistent pipeline throughout the year as you work towards achieving your annual quota
 - Ensure that opportunities and pipeline are up to date in Salesforce
 - Create and maintain an ongoing level of engagement with your named enterprise accounts including senior sponsors and decision makers.
 - Maintain a cadence of communicating with clients about their adoption trends, and mining opportunities for deeper discovery.
 - Act as the primary point of contact for all client business issues and escalations.
 - Monitor customer feedback and represent the voice of the client to provide input into the product roadmap.
 - Provide product demonstrations.
- Be responsible for the retention and growth of our clients by understanding their business needs and helping them succeed.
 - Monitoring objectives and key results. (OKR's)
 - Report weekly results to internal / clients' management team
 - Report monthly/quarterly/yearly (including variance) results to internal executives and customers
- Stay informed of company and industry products, policy, and procedure changes and abreast of the competition and their offerings.
- Provide Conquest's product development team with feedback to help further establish product market fit.

Your qualifications Include:

- 5+ years of Account Management or Sales experience in financial services or a B2B SaaS company.
- Proven track record of success in a quota-carrying role.
- Proven ability to mine and uncover new opportunities and build pipeline.
- Exceptional communication skills (oral, written and presentation skills)
- Experience building and maintaining relationships, including with Senior stakeholders.
- Passion for technology and for being a part of a fast-growing company.
- Experience working with cross-functional teams (e.g. Sales, Product, Marketing, Services)
- A high level of organizational ability, accuracy and attention to detail is required.
- Flexible approach, able to operate effectively with uncertainty and change.
- Driven, self-motivated, enthusiastic and collaborative team player.

What to expect:

- An inclusive culture comprised of extremely talented individuals.
- A leadership team with a proven track record of success.
- The opportunity to join a company as it expands across the globe.
- Competitive compensation and generous benefits.

Next steps:

- If this exciting opportunity appeals to you, please send us your **Resume** and **Cover Letter** outlining your relevant qualifications and work experience.

Send to the attention of Human Resources, Conquest Planning
human.resources@conquestplanning.com by February 15, 2026

Conquest Planning Inc. is an equal opportunity employer. Our inclusive work environment welcomes diversity and supports accessibility. If you require accommodation at any time during the recruitment process, please contact us at the Email above.