Conquest Planning endeavours 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. Leveraging 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 in market in January of 2021. Since that time, we have become the market dominant software provider for financial advice delivery in that market. Conquest serves the entire wealth continuum – from simple to complex.

We are growing fast and are seeking an **Account Executive Mid-Market Sales - US** to join our dynamic team! This is a fully remote – work from home opportunity for a candidate living in the United States or Canada and must be very familiar with the US financial services technology market.

The **Account Executive Mid-Market Sales - US**, reporting to the EVP, North America Sales will have experience in enterprise/mid-market software and/or SaaS sales with a vast network within the financial planning / tech space to leverage relationships to best advantage to create strategic opportunities to improve the systems these firms use to serve their end clients.

Duties of the role include:

- Manage the sales cycle to include lead generation, prospecting, qualifying, business development and closing sales.
- Build, manage, and keep management apprised on the sales pipeline as well as the competitive landscape conducting business in a profitable, ethical manner.
- Achieve sales targets on a monthly and quarterly basis through managing a large pipeline.
- Meet with prospects to explore needs, assess risks, and demonstrate how they can better manage that risk with our software solution.
- Effectively communicate the value proposition through proposals, demos and presentations and perform the necessary follow up and negotiations to close the deal.
- Collaborate on sales related content, pitch decks and collateral.
- Collaborate with the product team to ensure battle cards are up to date, easily accessible, and relevant to target markets.
- Proactively monitor and strive to maintain a high level of quality, accuracy, and process consistency in the sales organization’s planning efforts.
- Proactively identify and facilitate opportunities for sales process improvement.
- Work with cross functional teams in support of user adoption and deployment
- Monitor the assigned sales organization’s compliance with required standards for maintaining data.

- Nurture partnerships with associations and high-profile organizations to add value as well as generate brand awareness, leads and close sales.
- Own content management in Salesforce to keep pipeline and opportunities up to date, and meet weekly reporting requirements
- Collaborate with other areas to respectfully further the overall mission of the company.
- Leverage curiosity, communication skills, and drive to consistently improve your sales performance.
- Act as a culture champion and brand ambassador for Conquest's mission, to make advice accessible to all.

Qualifications required:
- Degree in business, technology, or related discipline. Licensing related to the financial industry a plus.
- 5 – 7+ years of experience in the financial advisor space with a deep understanding of the financial services sector.
- Proven record in meeting and exceeding sales targets, preferably selling software solutions in an mid-market RIA, Broker-Dealer environment.
- Proven ability to drive the sales process from plan to close.
- Proven ability to articulate the distinct aspects of products and services.
- Proven ability to position products against competitors.
- Demonstrable experience in sales, developing client-focused, differentiated, and achievable solutions.
- Connected in the industry with a strong personal/professional reputation and ability to build and maintain lasting relationships with key external stakeholders.
- Big Bank experience an asset.
- Ability to identify issues and implement creative and strategic solutions to overcome problems.
- Ability to plan, organize, develop, implement, and interpret goals, objectives, and policies.
- Strong sales cadence and business acumen.
- Ability to work in a fast-paced, dynamic environment.

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 an innovative company as it expands across the globe.
- Competitive compensation and generous benefits.

How to Apply:
We're excited to learn about you and want to give you the opportunity to set yourself apart from everyone else. Along with your Resume, send us a personalized Cover Letter, Email or Video with the following:

- Why you are interested in this job, the fintech industry, or any other reason you would like to work with us.

Next Steps:

If this exciting opportunity is of interest to you, please forward your application as described above by **February 15, 2026** with **Account Executive Mid-Market Sales - US** in the subject line to human.resources@conquestplanning.com

We thank all applicants for their interest. Only those invited for an interview will be contacted.

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 Human.resources@conquestplanning.com.