

JOB OPPORTUNITY

Position: Business Development Associate, Managed Assets
Reporting to: Manager, Inside Sales and Support Analytics, Managed Assets
Term: Full time
Location: 20 Eglinton Ave West, Toronto

Overview

As a member of the *Beutel Goodman Managed Assets* team, the *Business Development Associate* will be a key internal contact for investment advisors and individual investors and will be active in support of business development initiatives for Separately Managed Accounts (“SMA”) and mutual funds. The successful candidate will be able to demonstrate a track record of exemplary customer service, have strong verbal and written communication skills, thrive within a goal-oriented team environment and be able to work independently at times.

Major Responsibilities

- Proactively and confidently engage investment advisors in detailed conversations regarding our investment strategies, our peers, and capital markets.
- Promptly respond to requests and inquiries. Research and resolve issues accurately and document all relevant communications via our CRM database.
- Partner with *Regional Sales Directors* to develop and nurture relationships with investment advisors from across Canada:
 - Support the *Regional Sales Directors* in an analytical capacity - prepare product comparisons and competitor research as requested.
 - On a weekly basis, alert *Regional Sales Directors* to significant sales and redemptions.
 - Participate in sales meetings.
 - Contribute sales ideas to help grow our business.
- Regularly generate asset and sales reports for internal reporting purposes.
- Co-ordinate the production of monthly mutual fund/SMA wrap profiles and updates.
- Execute monthly e-mail campaigns through our email marketing platform.
- Regularly maintain our CRM database.
- Regularly maintain our website’s *Advisor Portal*.
- Stay up to date on our investment strategies and be cognisant of current events in the capital markets.
- Build effective relationships with internal and external stakeholders.
- Provide input to Marketing about investment product collateral.
- Participate in industry and intermediary events to enhance our presence in the marketplace.
- Adhere to all compliance, regulatory, and legal guidelines.

Qualifications

- At least two years of client service experience in the financial industry and a sound knowledge of the mutual fund business.
- Successful completion of the *Canadian Securities Course* required.
- Enrollment in CFA, CFP, CIM, or MBA programs will be considered an asset.
- Proficient in Outlook, Excel, Word, PowerPoint.
- Ability to effectively work with complex data.
- Hands-on experience with CRM software.
- Driven, ambitious and proactive individual with a strong desire to succeed.
- Fluency in French (written and verbal) will be considered an asset.

To apply, send your résumé to careers@beutelgoodman.com.