

JOB OPPORTUNITY

Position: Business Development Associate, Managed Assets
Bilingual – English and French
Reporting to: Regional Director, Managed Assets & Inside Sales
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”) mandates 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 clients in detailed conversations over the telephone and virtually regarding our strategies, and capital markets.
- Promptly respond to client requests and inquiries. Research and resolve issues accurately and document all relevant communications via our CRM database. This includes responding to all inquiries received in French (e-mail, telephone, and fax).
- 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.
- Regularly maintain our CRM database.
- Stay up to date on our investment strategies and be cognisant of current events in the capital markets.
- Build effective relationships with internal/external stakeholders.
- Occasionally, participate in financial industry and client events to grow our presence in the marketplace.
- Adhere to all compliance, regulatory, and legal guidelines.

Qualifications

- Experience in the asset management industry.
- Experience in a client facing role, successfully building long-term professional relationships with clients.
- Strong knowledge of the mutual fund industry.
- Successful completion of the *CSC* or *CIM* is required.
- Enrollment into CFA, CFP, or MBA program will be considered an asset.
- Strong sales acumen.
- 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.
- Fluent communication in English and French (written and verbal).

This posting is for a current vacancy on our **Managed Assets** team. To apply, send your resume to careers@beutelgoodman.com.

If you require any accommodations during the recruitment process, please email us at hr@beutelgoodman.com. A member of our HR team will reach out to you.