

JOB OPPORTUNITY

Position: Business Development Associate, Managed Assets

Reporting to: Regional Director, Managed Assets

Term: Full time

Location: 20 Eglinton Ave West, Toronto

Overview

As a member of the Beutel Goodman Managed Assets team, this role is a unique opportunity to provide support to an established Regional Director while also being personally responsible for mutual fund sales to a defined list of Dealers. The Business Development Associate (BDA) 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 BDA will also take ownership of a structured sales mandate focused on mutual funds, including dedicated prospecting, advisor engagement, meeting generation, CRM tracking, and ongoing advisor coverage. The enhanced scope is accompanied by commensurate compensation and offers a clear pathway to develop sales expertise, build meaningful industry relationships, and advance toward future business development opportunities.

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.

Major Responsibilities

- Support a Regional Director by fulfilling an inside sales role including structured outreach, advisor engagement, meeting setting and opportunity tracking. **(80%)**
- Assume primary responsibility for a dedicated list of mutual fund-focused advisor assets, providing a unique opportunity to own and grow a discrete book of business. **(20%)**
- Participate in an enhanced compensation model that recognizes this expanded ownership through commensurate incentive alignment, while accelerating professional development through greater accountability, commercial exposure, and closer partnership with Regional Directors.
- 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 via 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

- 3+ years of experience in the asset management industry.
- 2+ years in a client facing role, successfully building long-term professional relationships with clients.
- Strong sales acumen.
- Investment knowledge/ capital markets interest.
- Strong verbal and written communication skills.
- Thrive within a goal-oriented team environment.
- Driven, ambitious and proactive individual with a strong desire to succeed.
- Pursuing the CSC or CIM is preferred.
- Proficient in Outlook, Excel, Word, PowerPoint.
- Ability to effectively work with complex data.
- Hands-on experience with CRM software.

This posting is for a current vacancy on our Managed Assets team. To apply, click [here](#).

The base annual salary range is \$70,000 - \$85,000 + Direct Drive Commission.

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