

JOB OPPORTUNITY

Position: Sales Coordinator
Reporting to: Vice President, Managed Assets
Term: Full time
Location: 20 Eglinton Ave West, Toronto

Overview

As a member of the Beutel Goodman Managed Assets team, the Sales Coordinator plays a critical role in supporting the sales, service, reporting, and operational needs of the team. The position coordinates administrative functions, produces sales and asset reports, maintains CRM data integrity, supports advisor and client inquiries, and helps ensure the smooth execution of team initiatives.

The Sales Coordinator serves as a key point of contact for internal stakeholders, investment advisors, and individual investors, providing prompt and professional service while coordinating a variety of operational and sales support activities. As the team's Satuit CRM power user, the successful candidate will help drive data quality, reporting accuracy, and CRM adoption across the Managed Assets team.

The successful candidate will demonstrate exceptional organizational skills, attention to detail, strong communication capabilities, and the ability to manage multiple priorities effectively in a fast-paced environment.

Major Responsibilities

Sales Operations, Reporting & CRM Management (40%)

- Serve as the team's Satuit CRM power user, maintaining data quality, supporting users, generating reports, troubleshooting issues, and identifying opportunities to improve CRM utilization.
- Maintain advisor, dealer, contact, newsletter subscriber, and distribution-list records within Satuit CRM, including updates for unsubscribed and bounced email addresses.
- Update and maintain asset under management (AUM) information in Satuit CRM.
- Generate and distribute daily and weekly mutual fund sales reports, including updating new dealer representative codes on the master list.
- Generate weekly sales and AUM reports for Management and the SMA Sales Report.
- Prepare monthly SMA sales, mutual fund sales, mutual fund AUM, and BGMA comprehensive AUM reports.
- Generate monthly mutual fund and SMA profile sheets and quarterly SMA profiles.
- Provide updated master lists and distribution lists to the appropriate internal stakeholders, including Marketing.
- Support data analysis and ad hoc reporting requests from Regional Directors and senior management.

Advisor & Client Service Support (25%)

- Serve as a professional first point of contact for inbound telephone calls, emails, faxes, and administrative inquiries.
- Monitor the Managed Assets inbox and respond to incoming requests in a timely and professional manner.
- Address administrative service issues, including requests for duplicate tax slips, and coordinate resolution with the appropriate internal teams.
- Redirect investment product, portfolio, and sales-related calls to the appropriate Business Development Associate or Regional Director.
- Monitor incoming faxes and forward them to the appropriate departments.
- Document relevant advisor interactions and service activity in Satuit CRM.
- Build and maintain effective relationships with internal and external stakeholders.

Sales & Marketing Support (15%)

- Create, update, and maintain PowerPoint presentations for client meetings, conferences, sales campaigns, and internal presentations.
- Generate mutual fund and SMA profile sheets and support the preparation and distribution of sales collateral.
- Check and manage inventory of hard-copy marketing materials.
- Manage the distribution of Beutel Goodman promotional items to advisors and industry contacts.
- Coordinate with Marketing on newsletter distribution lists, the annual holiday card, and distribution estimates.
- Assist with the review of quarterly mutual fund and SMA commentaries and upload English and French mutual fund commentaries to the appropriate BGMA folder.

Team Administration & Coordination (15%)

- Manage and track team expense reimbursement submissions to support timely processing.
- Coordinate team travel arrangements, including booking flights and hotels and maintaining itineraries.
- Support meeting logistics, event registration, conference administration, and internal team activities.
- Review and maintain business continuity planning documentation.
- Coordinate recurring administrative tasks assigned by region and assist with special projects and process improvement initiatives as required.

Compliance & Operational Excellence (5%)

- Adhere to all compliance, regulatory, and legal guidelines.
- Monitor the CASL two-year period limit rule for prospects and support compliant communication practices.
- Ensure the accuracy of reports, client records, and operational processes.

- Identify opportunities to improve workflow efficiency, data quality, and service levels across the Managed Assets team.

Qualifications

- Experience in sales coordination, sales support, client service, administration, or the asset management industry.
- Exceptional organizational skills with the ability to manage multiple priorities and deadlines simultaneously.
- Strong verbal and written communication skills.
- Demonstrated commitment to delivering outstanding client service.
- Advanced proficiency in Microsoft Excel, Outlook, Word, and PowerPoint.
- Experience preparing reports and working with complex or large datasets.
- Hands-on experience with CRM software; Satuit CRM experience is considered a strong asset.
- High attention to detail and accuracy.
- Strong problem-solving and analytical capabilities.
- Ability to work independently while collaborating effectively within a team environment.
- Professional, proactive, and service-oriented mindset.
- Knowledge of the investment management industry is considered an asset.
- CSC or other industry-related coursework is considered an asset.
- Bilingualism (English/French) is considered a strong asset. The ability to communicate effectively in additional languages is also highly valued.

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

The base annual salary range is \$65,000 - \$75,000.

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.

Note: Applications must be submitted through our application portal to be considered.