RICHARDSON GMP

Position Title	Business Development Assistant
Location	Guelph
Reporting To	Branch Management
Position Overview	The ideal applicant will be results-orientated, self-motivated and be able to work both independently and within a team environment. The aspirant will be responsible for developing and managing a growing marketing campaign which includes conducting marketing, sales and business development functions in a growing wealth management practice targeting business owners and high net worth individuals.

Duties and Responsibilities

- Identify and network with potential clients (business owners and high net worth individuals) and personally contact them to book meetings for the wealth management team
- Acquire expert knowledge about potential clientele
- Liaise with in-house marketing team to build and improve marketing strategies
- Actively adopt and maintain the team's holistic approach to wealth management and be able to communicate those processes to prospective clients
- Execute targeted direct sales campaigns to business owners and high net worth individuals
- Join business and professional networking groups, attend industry events, and interact socially with potential clients
- Employ social media/website strategies and conduct online marketing campaigns
- Seek out public speaking engagements for investment team
- Maximizing relationships with internal and external "clients" and other key stakeholders
- Arrange wealth management seminars and personally contact potential clients to ensure attendance
- Record and document all communications with prospective clients on CRM while managing the marketing process at all levels

Desired Skills and Experience

- Post-secondary Degree/Diploma (preferably in Marketing), along with relevant experience (2-3 years minimum experience preferred)
- Proven track record of achievement in previous marketing / sales role
- Must possess excellent verbal and written communication skills
- Must have strong interpersonal skills and comfortable in both group and individual meeting situations
- Needs to be very comfortable initiating contact and asking questions to recognize potential clients
- Highly organized with attention to detail and the ability to work on multiple projects simultaneously while meeting deadlines
- Ability to negotiate, mediate, make decisions within scope, solve problems and persuade
- Proficiency working MS Office and CRM software
- Knowledge of the investment industry would be an asset (not mandatory)
- Must have a resilient and assertive personality
- Ability to work autonomously while exhibiting initiative and attention to detail.

Additional Information:

- Compensation will be performance based.