



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 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.