Position Description

Position Title:	Business Development Associate
Reports to:	Branch Manager
FLSA:	Non-Exempt
Date:	March 2018

Position Summary:

The Business Development Associate assists with new client acquisition, event planning, outreach opportunities in local communities, and area advertising and marketing efforts.

Duties and Responsibilities:

1. Business Development, Sales and Marketing
    a. Assists financial advisors in the sales of the products and services offered by Shaffer Capital.
    b. Identifies prospective clients, develops approach strategies and executes sales plans using consultative selling methods. Collects and organizes information using questionnaires, checklists and other means.
    c. Qualifies prospective clients using valid and reliable criteria.
    d. Collaborates in the development and execution of marketing strategies. Assists with the assembly of kits, presentations, pitch-books, mailings, etc.
    e. Plans and attends events for current clients and to attract prospective clients. Makes follow-up calls and schedules meetings with prospective clients.
2. Communications
    a. Prepares electronic, paper and other written communications pieces.
    b. Documents business related tasks, emails, letters, notes, as required in the Shaffer Capital CRM.
    c. Updates contact information in the Shaffer Capital CRM and applicable services provider systems.
    d. Maintaining schedules, phone calls and tasks for self and others in the office.
    e. Makes proactive contact [phone calls, emails, etc.] with clients and prospects as necessary.
3. Other duties as required.

Necessary competencies:

1. Communicates effectively over the phone
2. Consultative selling skills
3. Driven for Results
4. Financial acumen
5. Planning and execution

6. Problem solving
7. Self-motivated and self-directed
8. Teamwork

Technical Expertise

1. Experience articulating financial services by phone and schedule meetings for SC financial advisers with qualified prospective clients is preferred.
2. Experience in the financial services industry is preferred.
3. Computer proficiency: proficient in MS Office 365 [Outlook, Excel, Word, PowerPoint, Skype for Business] or similar suite is required. Experience with MS Dynamics CRM and other industry-specific tools is preferred.

Education and Experience

1. Education: Bachelor's degree in marketing, finance, accounting, or business administration is required.
2. Certification: Series 65 is preferred. Life and health insurance license is preferred.
3. Years of relevant experience: 1 to 3 years of internal financial sales experience is preferred.