Sample Job Description: Business Development Officer

*IMPORTANT: These job descriptions are samples only; customize each section to your firm and the specific role.*

**WHO WE ARE:**

{Company Name}, a growing wealth management firm, is seeking an Operations Associate to assist us in our mission of helping clients achieve their financial goals. This is your chance to play a key role in the future success of our fast-growing organization!

*Insert here: any awards or accolades the firm or owner has received. For instance, “Become a member of one of the most respected teams in the wealth management industry. XYZ Wealth Management Group was recently named #25 on Registered Rep’s list of the Top 100 Advisors.”*

*Insert here: any unique aspects of your culture, such as company core values and how your culture looks in real life.*

Our mission at {Company Name} is to {Insert Company Mission Statement}. If you have a relentless, burning desire to succeed and share our vision, then we would love to hear from you!

**WHO WE WANT:**

The Business Development Officer will be responsible for supporting the Managing Partner of Carson Wealth by developing new opportunities within all channels including networking, call campaigns, presenting at workshops, attending events, and championing community involvement. Successful candidates will be able to represent Carson Wealth and build long-lasting relationships.

**WHAT TO EXPECT:**

* Cultivate and maintain effective business relationships with decision makers
* Pursue prospects from all mediums
* Get commitments from prospective clients to take an Intro meeting
* Participate in the planning and sales process for new opportunities
* Position and differentiate CWM by educating centers of influence on our vision and services
* Create marketing strategies for prospects, referrals and existing relationships
* Identify large opportunities
* Influence people to take the first meeting
* Present our Value Proposition to potential clients
* Build relationships with Wealth advisors, operations team and WEG
* Present at seminars and training sessions
* Cultivate strong relationships with centers of influence including estate planning attorneys, CPA’s, etc.
* Attend events and conferences
* Attend networking events
* Follow up on leads generated through our website, Wealth from Wisdom radio, Barron’s, etc.
* Champion community involvement through charitable involvement
* Be able to consistently deliver CWM value Proposition to prospective clients

**WHAT YOU NEED:**

* Demonstrated track record of exceeding sales goals
* Must be able to work independently
* Proven ability to present to large and small groups effectively
* Excellent communication skills
* High level of emotional intelligence
* Must be open to working varied hours that can include evenings and weekends.
* Possess a strong work ethic and strong personal values

**PREFERRED EDUCATION AND EXPERIENCE:**

* 5+ years of experience as a successful business development officer or similar role, preferably in Financial Services.
* Bachelor’s degree or higher preferred

In exchange for your expertise, we offer a base salary, bonus potential, 401(k) plus matching, health benefits, a potential for career growth, and a great working environment. This is your chance to play a key role in the continued success of our company. Our culture is fast-paced, motivational and focused on healthy living. Smokers need not apply. For more information about our company, please visit our website {Insert Company Website}.

If you’re interested in this opportunity, please send your resume and letter of interest to {Name and Email Address}.

We are an equal opportunity employer and all qualified applicants will receive consideration for employment without regard to race, color, religion, sex, national origin, disability status, protected veteran status, or any other characteristic protected by law.