BetaShares
Exchange Traded Funds

Business Development Associate (BDA) / Portfolio Analyst – Adviser Services

BetaShares is one of Australia's leading Fund Managers of Exchange Traded Funds ("ETFs") and related products. ETFs have been one of the fastest growing categories of investment products in the world over the last decade and the Australian market is set to continue growing strongly in the coming years. BetaShares currently manages $3.6billion across 38 funds and the business intends to significantly expand this offering.

ETFs are traded on the ASX like any share and deliver transparent exposure to a broad range of market indices and asset classes including Australian and international equities, cash, commodities, currencies, income strategies and alternatives.

Role Description

BetaShares is seeking an energetic, driven and self-motivated professional to assist the BetaShares Adviser Services Team in all aspects of the sales and service proposition to financial advisers. The role will be responsible for two (2) key areas:

1. Portfolio Analytics
2. Business Development

The role will be Sydney based, and may require regular interstate travel.

The role reports to the Director of Sales – Institutional and National Accounts.

Responsibilities

<u>Portfolio Analytics</u>

- Collate Morningstar Analytics for BetaShares ETFs - Periodic and bespoke
- Questionnaires, RFIs & RFPs
    - Create and maintain RFPs for all flagship ETFs
    - Collate bespoke RFPs for all wholesale, MDA, research and institutional prospects
    - Collate analytics and other responses to information requests in respect of BetaShares funds
- Update information in Institutional Databases as required

<u>Business Development</u>

- Work closely with the Director of Sales in the execution of the strategic business plan to generate inflows into BetaShares ETFs.
- Utilise the telephone for lead identification, follow-up activity, client profiling and setting up meetings.
- Exceed the minimum sales activity standards which includes productive calls, meeting follow-ups and meetings booked.
- Manage client service of large group of advisers and incoming client inquiries
- Manage and coordinate events, webinars, seminars and conferences relating to activities associated for the Adviser Services team.
- Develop, grow, and maintain relationships to provide education on product, position investment ideas, client and other value-add services

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- Consistently strive to raise the profile of BetaShares as a company and the products it provides.
- Utilise CRM technology to capture sales activities and track the progress of sales opportunities and prepare regular management reports
- Manage day-to-day operational duties (i.e. manage and track sales lead flow, manage and maintain existing and prospect client databases, report weekly activities, etc.)
- Embody a high degree of integrity and always act within compliance of the Industry regulations.

Skills & Qualifications

- Bachelor degree in Business, Commerce, Economics or similar, with a strong aptitude in statistics/ financial mathematics
- 1 – 3 years of experience in the financial services industry
- Experience with analytics software (Morningstar Direct, Mercer MPA or similar) an advantage
- Strong proficiency with Excel will be an advantage.
- High energy, motivated individual, committed to excellence
- Strong professional phone skills, interpersonal skills and presentation skills
- Experience working within planned monthly sales activity targets
- Ability to analyse and discuss comprehensive portfolio applications, market research and economics.
- Exceptional verbal and written communication skills
- Proficiency in Word, Outlook, and CRM technology.
- Strong character and professional references