

## **Business Development Manager (BDM) – Adviser Services (Melbourne based)**

### **Summary**

<b>Title</b>	<b>Business Development Manager (BDM) – Adviser Services</b>
<b>Team</b>	Sales
<b>Manager</b>	Executive Director / State Manager
<b>Position Type</b>	Permanent
<b>Location</b>	Melbourne

### **About the Role**

We are seeking a driven Business Development Manager – Adviser Services to deliver our sales and service proposition to financial advisers.

As a key contributor to the Betashares sales team, you will be expected to undertake the full spectrum of distribution activity - from prospecting the client database and face-to-face interaction with financial advisers, right through to meticulous follow up, query handling and collating in-depth performance analytics.

Previous experience working as a Business Development Manager in the financial services industry will be highly regarded in this client facing role, as will a strong knowledge of investment markets, economics, statistical measures and the portfolio construction processes. Prior outbound sales experience would be advantageous, as will those who have a sound knowledge of the financial services industry in Australia.

The role will be Melbourne based and may require interstate and regional travel. The role ultimately reports to the Executive Director / State Manager, and may have supervisory and mentoring guidance from the Head of Sales.

This is a fantastic opportunity to build knowledge and a career in one of the most innovative and progressive funds management firms in the financial markets industry.

Additionally, there is scope and possibility to be involved in other segments in the future eg Institutional and/or Key Accounts.



## About Us

Betashares was founded in 2009 and launched with the vision to create intelligent and accessible investment solutions for Australian investors. Over the past decade our dedication to helping Australian investors achieve their financial goals has seen Betashares grow from 'challenger' to market leader, driving disruption and innovation in the exchange traded funds (ETFs) industry.

Betashares offers the broadest range of exchange traded funds on the ASX and is trusted by hundreds of thousands of investors. As of June 2023, Betashares manages over \$28 billion in assets.

We currently have offices in Sydney, Melbourne, Brisbane, Perth and New Zealand and a growing team of over 130 people.

## Our Values

As our business continues to grow, we're committed to creating a workplace that gives us all the best opportunity to succeed, and that is enjoyable to be a part of.

We prize ambition and drive, but equally we value honesty and humility.

We support each other, and we respect our clients and our competitors. Innovation is in our DNA, and we are always looking for better ways to do things and are willing to take measured risks and learn from our mistakes along the way.

## What we offer

Betashares believes our most important asset is our people and we are proud of the culture we have built – but we are always striving to be better. We want every Betashares employee to be doing their best work and developing their careers.

In addition to a competitive salary, we also offer:

- Staff career development and training allowance.
- Access to a health and wellbeing platform with physical, mental, social and financial support programs available.
- Flexible workplace – you'll have the opportunity to work flexibly based on your individual needs and personal circumstances.
- Volunteering days off, so you can contribute to a cause that matters to you.
- Newly renovated CBD offices with fully stocked kitchen, team breakfasts and catered lunches on a regular basis.
- Fun and inclusive social events.

This role is a fantastic opportunity for someone looking to further their career in a growing and dynamic business.

## Role Responsibilities

Key responsibilities of this role will include:

- Execute sales activities in the adviser channel for specific regions and/or an adviser panel as assigned by the Head of Sales and State Manager to achieve assigned net-flow targets.
- Adviser panel will include both IFAs and leading advisers within national groups.
- End-to-end sales process execution i.e. prospecting, booking meetings, conducting meetings and all follow-ups.
- Lead identification, follow-up activity, client profiling and setting up meetings.
- Maintain and exceed key sales activity targets, which includes calls, meetings and CRM upkeep.
- Cultivate and manage client relationships by ensuring that Betashares provides exemplary client services to financial advisers
- Position investment ideas and portfolio construction principles with clients to demonstrate the benefits of Betashares products in client portfolios.
- Consistently strive to raise the profile of Betashares as a company and the investment solutions it provides.
- Proactively organize seminars/webinars, conferences and PD day participation
- Manage an efficient schedule to be in constant engagement with new and existing clients, coordinate collateral for meetings and presentations.
- Capture sales activities and track the progress of sales opportunities in CRM, prepare regular management and pipeline reports
- Embody a high degree of integrity and always act within compliance of the industry regulations.

## Key skills and experience

- Undergraduate tertiary qualifications essential. Post-graduate qualifications will be highly regarded.
- 3-5 years of previous experience in the financial services industry (preferably in funds management and investment platforms), with a primary focus on adviser sales.
- Strong sales skills, interpersonal skills and presentation skills
- Willingness to prospect and outbound call clients will be a key focus.
- Experience working within planned monthly sales activity targets and contributing to a sales target.
- Knowledge of the portfolio construction processes and asset allocation as applied by advisers.
- Highly organised and able to multi-task
- Exceptional verbal and written communication skills
- Strong character and professional references

Ready to make an impact? If you have full working rights in Australia, please submit your CV to [careers@Betashares.com.au](mailto:careers@Betashares.com.au). Your interest will be treated in strict confidence.