BetaShares
Exchange Traded Funds

Business Development Associate (BDA) – Adviser Services (Sydney based)

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 $4.5billion across over 40 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. As a key contributor within the BetaShares sales team, you will be expected to undertake the full spectrum of sales activity from prospecting and front line interaction with financial advisers, right through to follow up, query handling along with performance analytics.

Up to 3 years work experience, preferably in a financial markets environment, will be highly regarded in this client facing role, as will knowledge of investment markets, economics, statistical measures and portfolio construction processes.

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

The role reports to the Sales Strategy Manager and ultimately the Director of Sales – Institutional and Adviser Services.

The role will provide you with the opportunity to build knowledge and a career in one of the most innovative and progressive funds management firms in the financial markets industry.

Responsibilities

- Work closely with the Sales Strategy Manager and 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
- 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
- 1 – 3 years of experience in the financial services industry
- Experience with analytics software (Morningstar Direct, Mercer MPA or similar) an advantage
- 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