

Associate Account Manager - Funds Management Sales

BetaShares is one of Australia's leading managers of Exchange Traded Funds ("ETFs") and related products. ETFs have been one of the fastest growing categories of investment products globally and in Australia over the last decade and the market is set to continue growing strongly in the coming years.

ETFs are traded on the ASX like shares 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. BetaShares currently manages \$5 billion across over 40 funds. The firm is also uniquely positioned in the market in that it offers exposures that may be suitable to both rising and falling markets.

Role Summary

BetaShares is seeking a high energy, self-motivated individual to support and build on the success of the team to date. The successful candidate will be involved in front-line phone based sales across the full range of Betashares' adviser client segments and products. The ability to build relationships and interact meaningfully in a professional manner with adviser clients is a must.

As a key contributor within the BetaShares sales team, your focus be on prospecting of potential new clients and development of such prospects into meaningful relationships for the business. Candidates will be expected to handle all aspects of sales activity from prospecting and relationship management right through to follow up and accountability for reaching agreed targets.

2-3 years' experience in phone based sales, preferably in a financial markets/funds management environment, will be expected in this client facing role, as will knowledge of markets and the workings of financial advice businesses and asset allocation practices. An analytical mindset and skills in excel will be highly beneficial.

The role will provide you with the opportunity to build knowledge and a career in one of the most innovative and progressive financial services segments and firms. It is anticipated that the successful candidate will have the skills, ability and desire to progress to managing more senior client relationships over time as their skills, knowledge and experience grows.

Responsibilities

Key responsibilities of this role will include:

- Working closely with the Directors of Sales in the development and execution of a strategic business plan to generate growth in assets under management for BetaShares.
- Utilising the telephone and exceptional organizational skills to manage a sales pipeline requiring lead identification & prioritisation, follow-up activity, client profiling, setting up meetings/conference calls, and sales execution.
- Delivering sales pitches and servicing clients over the telephone in relation to the BetaShares exchange traded funds.
- Utilising BetaShares' CRM to capture sales activities and tracking the progress of sales opportunities.
- Developing processes to analyse and monitor sales team activity and results and utilising this information to improve team performance.

- Planning and managing client events conducted by the broader team.
- Embodying a high degree of integrity and always acting within compliance of industry regulations.

Key skills and experience:

- B Com, B Bus, B Ec. or equivalent is highly desirable.
- Phone based sales experience with a strong track record a must.
- 2-3 years of experience preferably in financial services/funds management, RG 146 qualification an advantage.
- Experience working with planned monthly sales activity targets.
- Ability to analyse and speak about comprehensive portfolio applications, asset allocation, market research and economics.
- Exceptional verbal and written communication skills.
- Proficiency in Word, Excel, Outlook, PowerPoint. Advanced spreadsheet skills, and experience using CRM technology an advantage.
- Strong character references.

To apply for this role or to find out more information, please email your CV to careers@betashares.com.au. Your interest will be treated in strict confidence.