Business Development Specialist - Job Description

COMPANY BACKGROUND

Advanta IRA is a leading self-directed account administrator with $3 billion in client assets under management. We act as a third-party administrator and recordkeeper for individuals who self-direct their retirement accounts by investing in alternative assets such as real estate, start-ups, and private placements. Advanta IRA delivers unparalleled one-on-one customer service, industry expertise, and educational tools that help ensure our clients' success.

POSITION BACKGROUND

Advanta IRA's objective is to continue to grow the business by adding new clients, new referral sources, and new business partners. This can be achieved by delivering exceptional customer service for existing and potential prospects, developing new lead sources, and building relationships with professionals (and professional organizations) throughout the community and beyond.

The successful candidate for the Business Development Specialist position will be a self-starting, motivated individual with a background in sales. The successful candidate is proactive, energetic, and conducts themselves professionally. The Business Development Specialist works closely with the Vice President of Sales and is responsible for helping to establish new leads and business opportunities.

JOB EXPECTATIONS

- Learn and understand Advanta IRA's services and be able to communicate these services to potential clients.
- Receive incoming and place outgoing calls, emails, and consultation requests to potential new clients, answering questions about opening an account and making investments with their account.
- Identify and develop new referral sources and relationships through warm and cold prospecting calls to targeted individuals and companies.
- Routinely attend networking events and other such meetings to develop additional clients and business leads. Such meetings may be held outside regular business hours and occasionally on weekends. Some meetings are held on online platforms, such as Zoom, in markets nationwide.
- Lead educational training sessions such as online webinars, in-person lunch seminars, podcasts, and continuing education (CE) classes. This training may also include being a guest for referral partners or professional organizations and seeking out those types of opportunities.
- Help develop and record audio/video marketing materials, such as short YouTube videos, social media ads, podcast recordings, and more.
- Assist in implementing targeted marketing campaigns, update data collected in those campaigns, and track results.
- Demonstrate understanding of self-directed IRA essentials, including account types, prohibited transactions, and potential investments.
- Develop email and phone campaigns to set up seminars, speaking opportunities, and other marketing events.
- Assist in moving potential clients through the account opening process by assisting them in completing forms, answering questions on potential investments, and involving other marketing/transaction staff to handle more advanced issues that a potential client may have.

- Nurture potential clients through the sales funnel from lead to client.

SKILLS, BACKGROUND & TALENTS REQUIRED

- Have 1-3 years of sales experience (preferred).
- Show proficiency in Microsoft Word, Excel, PowerPoint, and Outlook.
- Be familiar with Salesforce.
- Be exceptionally well organized, analytical, and detail oriented.
- Must be personable and maintain a professional appearance and demeanor in social interactions and networking events.
- Utilize excellent verbal, written, and interpersonal communication skills, primarily focusing on customer service.
- Be a self-starter who can work alone without supervision.
- Excel at accomplishing tasks on time and following up with necessary parties (clients and team members).
- Be a quick learner who can rapidly grasp and retain tangible and intangible ideas.

LOCATION

- Atlanta, GA

COMPENSATION & BENEFITS

- Full-time salaried position plus bonus
- Health, dental, and vision insurance
- Expense reimbursement
- 401(k) plus company match
- Paid time off plus 9+ Federal Holidays