

Regional Director, Business Development AlphaDelta Funds Canada

AlphaDelta Funds is one of Canada's pre-eminent asset management firms. We are a premiere provider of domestic and global investment management to investors looking for a significant difference in their portfolios.

Location: Vancouver, BC / Toronto, ON

Your Opportunity

This is your opportunity to join our team and work alongside professionals with successful track records who are looking to build another dynasty.

We are seeking a high energy, self-motivated professional to build and grow relationships with Full Service Brokerages (IIROC-licensed) / MFDA Advisors in Vancouver and the Greater Toronto Area (GTA).

You'll have one primary goal – to effectively manage the territory towards exceeding personal and team sales goals.

Primary Responsibilities

- Call on full service Investment Advisors to support and grow their business through AlphaDelta funds
- Deliver sales presentations, seminars and meetings with clients / prospects
- Consult with Financial Advisors to help build their business through increasing product knowledge, disseminating industry data and driving prospect and lead generation ideas on investment strategies
- Manage all conference activity and speaking engagements in the GTA
- Work with the internal wholesaler (associate) to maximize territory sales coverage
- Interact with team members to ensure superior service, marketing and technology support to Financial Advisors and follow up on problem resolution
- Track and analyze sales activities to assess plan effectiveness and discover opportunities for improvement

- Utilize CRM system to follow up on meetings and implement with administrative staff (phone calls, thank you notes, tracking etc)
- Manage budget to maximize time and resources
- Work as a contributing member of a team that thrives on partnership, communication and execution

Qualifications

- Energetic, self-motivated individual with a commitment to excellence
- At least 3 years' experience in the financial industry with 3–5 years direct outside intermediary sales experience with a mutual fund, separate account or hedge fund distributor
- Bachelor's degree and/or Canadian Securities Course
- CIMA, CFA or other industry certification an asset
- Extensive knowledge of the full services brokerage market
- We value experience in the GTA area, existing industry relationships, and strong reputation among advisory community
- Ability to develop relationships with clients / prospects and deliver ideas and information that will generate sales and assets
- Extensive knowledge of the full services brokerage market
- Exceptional verbal and written communication skills
- Exceptional ability to travel as necessary

About Us – Our Team and History

AlphaDelta has a team of experienced, successful industry professionals.

Our Founder / CEO is a former C-Suite Executive of a Global Money Manager with over \$140 billion in assets.

Our Board Members have successfully:

- Built a mutual fund company from shell to multi-billion dollar platform
- Launched one of Canada's fastest growing fund companies
- Established national distribution of all fund platforms

www.alphadeltafunds.com