COMMUNITY CAPITAL MANAGEMENT, LLC
JOB DESCRIPTION: BUSINESS DEVELOPMENT ASSOCIATE (HYBRID WHOLESALER)
LOCATION: FORT LAUDERDALE, FL or REMOTE
START DATE: FLEXIBLE BASED ON CANDIDATE

Community Capital Management, LLC ("CCM"), a leading fixed-income impact investment manager, is hiring a Hybrid Wholesaler to join their sales team in Fort Lauderdale or remotely. Seeking a motivated candidate to grow assets, generate leads, acquire clients, develop SalesForce CRM, handle inquiries, and engage with clients/prospects.

The role of the Business Development Associate (BDA) is to serve as a Hybrid Wholesaler, focusing on building sales momentum and providing client service support for mutual funds, ETFs, and separately managed accounts within a specific territory. The BDA's primary responsibilities include working directly with intermediaries, such as financial advisers, to cultivate relationships, deliver sales presentations, and offer superior client service.

The BDA will actively engage in outreach efforts, both through phone calls and in-person meetings, to connect with financial advisers and present CCM products. They will educate prospective clients about the features and benefits of CCM products as well as address any inquiries or concerns. Additionally, the BDA will identify new sales opportunities and contribute to the launch of new products or marketing campaigns.

In addition to their direct client interactions, the BDA will support the sales and marketing initiatives of the organization. This may involve collaborating with other members of the Business Development team, maintaining knowledge of assigned territories, investment products, and ongoing marketing campaigns. The BDA will also proactively seek new business opportunities wherever possible.

Communication with clients primarily occurs through phone calls, emails, and web conferencing. However, the BDA will also spend some time meeting face-to-face with prospects and clients outside the office. This position requires a strong understanding of the assigned territories, investment products, and the ability to provide exceptional client service.

Overall, the Business Development Associate plays a crucial role in driving sales, maintaining client relationships, and supporting the business development efforts of CCM.

Primary responsibilities:

- Prospect and Drive Sales: The BDA will actively seek out and pursue sales opportunities at various financial institutions, including wirehouses, independent registered investment advisers (RIAs), broker/dealers, and other relevant entities. This involves identifying potential clients and engaging in sales activities to promote CCM products.
- Target Larger Distribution Opportunities: The BDA will focus on identifying and targeting larger distribution opportunities within their assigned territory. This entails recognizing potential clients or channels that can significantly impact sales growth and prioritizing efforts towards capturing those opportunities.
- Provide Marketing Materials: The BDA will assist the senior sales staff by providing marketing materials or any other resources requested. This may involve sharing product information, brochures, presentations, or other collateral that supports the sales process.
- Collaborate with Business Development Team: The BDA will work closely with other members of the business

development team to share knowledge and insights about the local market. This collaboration facilitates a comprehensive understanding of the territory, target clients, and industry trends, enabling more effective sales strategies.

- Maintain Product Knowledge: The BDA is expected to possess a high level of product knowledge. This knowledge empowers financial advisors and clients, enabling them to make informed investment decisions. Staying updated on product features, performance, and industry trends is crucial in delivering value-added support and guidance.
- Conduct Proactive Calls: The BDA will proactively initiate and conduct a variety of calls on a daily basis. These include thank you calls, sales campaigns, follow-up calls, and others aimed at nurturing relationships, generating leads, and driving sales.
- Utilize SalesForce CRM System: The BDA will utilize the SalesForce Customer Relationship Management (CRM) system to execute their business plan effectively. This involves leveraging CRM functionalities to manage and track relationships, opportunities, and activities, ultimately fostering new connections and providing exceptional customer service.
- Conduct Meetings: The BDA will conduct meetings of various types, including webinars, group sessions, seminars, one-on-one meetings, and conferences. These meetings serve as platforms for presenting CCM products, addressing client needs, providing education, and building relationships with financial advisors and clients.
- Attend Industry Conferences: The BDA will participate in industry conferences relevant to their target market. This involvement offers opportunities to network, stay updated on industry trends, and coordinate group or one-on-one meetings with prospects or existing clients.
- Travel: The BDA will travel at least one to two times per month to visit prospects and/or clients within their assigned territory. Face-to-face interactions are valuable in establishing and nurturing relationships, understanding client needs, and providing personalized support.

Qualifications:

- At least 3 years of sales or relationship management experience, preferably in a sales support function at an asset manager
- Undergraduate degree
- Strong knowledge of fixed income investments
- Strong communication skills including the ability to deliver persuasive, concise, and well-organized presentations and messages
- Ability to create, build and maintain relationships with financial advisors and other intermediaries in a fast-paced environment with a high level of professionalism
- Excellent listening skills as well as the ability to identify opportunities and suggest creative solutions
- Strong time management and organizational skills
- Ability to thrive in an independent, challenging, and collaborative sales environment
- Possess understanding of investment fundamentals (capital markets, modern portfolio theory and asset management performance analysis)

For consideration, please send cover letter and resume to jobs@ccminvests.com; reference "Business Development Associate" in the subject line.