



NORTH BERKELEY INVESTMENT PARTNERS

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Marketing and Sales Development Specialist

Our Firm: We are a growing, team-oriented investment advisory firm with 225 client relationships and \$300M+ client assets under management. Client needs set the stage for our work. Our goals are to help individuals, couples and families feel comfortable and confident in making financial decisions related to their life goals, and to get our clients competitive investment performance while limiting downside risk. North Berkeley is a certified B Corporation, built around stakeholder interests.

This Position: Designed to attract an experienced marketer who can manage sales and continue to build a brand. We need an excellent communicator who can also listen and be curious about people and their stories, and who has real experience delivering a story related to a mission, whether in the for-profit or not-for-profit sphere. This role is responsible for generating and managing an adequate stream of appropriate client prospects to the firm so that we may manage sustainable, organic growth. While experience delivering financial advisory marketing will be preferred, we plan on training the appropriate candidate to translate our story both in conversation over the phone and in person, online, visually, and in writing.

Core Responsibilities:

Grow and manage a stream of prospects for the firm's organic growth

- Manage sales pipeline and all activities surrounding prospective client intake
- Be a key contact with the client during the sales process, including initial inquiries
- Create new opportunities to grow the firm's visibility including but not limited to the firm's existing networks
- Assist with forecasting quarterly, annual, and long-term sales goals

Maintain and enrich the firm's brand expression in life, in copy, and online

- Manage, develop, and grow our event calendar with meaningful opportunities for prospects, clients and friends to meaningfully experience the firm, and deliver quality events throughout the year
- Continue to build our web presence including new content development
- Maintain and continue to build our presence on Facebook, LinkedIn and other social media
- Build our understanding of our online impact and increase it through intelligent use of analytics and targeted online advertising
- Grow relationships with our community partners, whether through sponsorship, advertising, or other visible networking
- Steward the firm's visual and physical brand identity and expression



Build a high-quality client appreciation effort that creates more conversations

- Create client appreciation events that are also referral events
- Track client appreciation touches for maximum coverage, and segment for opportunity
- Build and execute on a client survey program that is meaningful and actionable for the firm

Qualifications:

- Bachelor's degree with 3.4 GPA or higher, or equivalent, required
- Minimum two years' experience in a relevant sales and marketing role at a company with a clear mission required
- Proven grower of relationship-driven sales pipeline
- Good and open communicator, question-asker, storyteller
- Excellent writer with a feel for broad narratives and how they weave together
- Proven ability to work successfully under pressure with details and a wide variety of work to prioritize, with a high degree of timeliness and accuracy
- Proven talent and experience at anticipating the needs of others
- Personal maturity and a professional focus
- Impeccable ability to maintain confidentiality
- Team-oriented and outlook that no job is too lowly on which to pitch in
- Passionate about quality
- Proven ability to take initiative
- Proficient on social media platforms & with MS Word, experience with visual design a plus
- Must be willing to complete a background check done by a contracted third party and to complete personality type testing using standard tools

Hours: The position is full time, and our office hours are 8-5. Some work hours outside that time when with clients or prospective clients.

Compensation/Benefits:

- Competitive compensation that is a base salary and significant sales-based pay
- Vacations, holidays and community service time off
- Medical, Dental, Long Term Disability, 401k, and Profit Sharing Plan
- Comprehensive financial planning and investment management services like those delivered to clients of the firm

How to Apply:

- Applicants should email a cover letter and resume to Sue Reinhold, Ph.D., at sue@northberkeleyinvestment.com. No phone calls, please.
- You can learn more about our firm at www.northberkeleyinvestment.com and at <https://www.bcorporation.net/community/north-berkeley-investment-partners>.

