

# CAPSTONE

ASSET MANAGEMENT™

Capstone Asset Management is a Portfolio Manager, Investment Funds Manager and Exempt Market Dealer serving clients in British Columbia, Alberta, Manitoba, Ontario and Quebec. Holding to Biblically informed values, we provide full discretionary investment management and individual investment mandates to high net worth individuals and families, institutions, pensions, foundations and family offices. We are a boutique firm with over \$350 million in assets under management.

*Title:* Sales and Business Development Manager

*Reporting to:* Glenn Murray, President & Chief Investment Officer

*Department:* Sales & Marketing

*Location:* Langley, BC

## *Summary of Position*

Capstone Asset Management seeks an experienced sales professional to help grow the business through the ongoing development and management of Capstone's sales and marketing initiatives.

The successful individual will be a proven driver of business development who is well-connected, with an aptitude for building lasting connections and fostering existing relationships while also aligning with our values. Capstone offers a competitive salary and bonus structure, benefits package, generous vacation allowance and a positive, highly collaborative working environment.

## *Duties & Responsibilities*

- Generate leads and sales opportunities
- Establish strong centres of influence
- Leverage existing contacts to introduce Capstone's services
- Oversee the corporate marketing strategy
- Develop marketing materials to support the sales effort and build the marketing presence
- Work closely with Portfolio Managers to enhance sales
- Track, monitor and follow-up with potential leads
- Liaise with high net worth individuals, family offices, institutions and foundations



## *Qualifications & Experience*

- Completion of Canadian Securities Course or similar investment education
- Must be registered or registrable as an Exempt Market Dealer Representative
- Registrable as a Portfolio Manager or Associate Portfolio Manager an advantage
- Experience in a Fund Management, IIROC, MFDA or CSA regulated environment an advantage
- Prior proven sales experience in the investment management industry
- Interest and experience in building a sales and marketing strategy
- Ability to open sales avenues and close institutional and/or individual high net worth cases

## *Skills*

- Proficiency with MS Office
- Self-starter
- Ambitious
- Results driven
- Team player

Please forward your resume and cover letter in confidence to [careers@capstoneassets.ca](mailto:careers@capstoneassets.ca)

Capstone thanks you for your interest; however, only candidates selected for an interview will be contacted.

