Business Development & Inside Sales Representative

- Do you have a fascination with both finance and sales?
- Have you always been interested in savings strategies, mitigating taxes and understanding the stock market?
- Do you have exceptional calling skills?
- Are you able to handle objections with a smile and convey value to prospective clients in a refined way?
- **Are you looking for a role with unlimited upside and uncapped quarterly bonuses, benefits, and a flexible workplace?**

Reporting to the Director of Marketing the Business Development & Inside Sales Representative is responsible for identifying, nurturing and booking potential prospects to meet with our wealth management team and owning the prospect relationship until they become clients, to help achieve the firm's new client acquisition goals. This includes identifying opportunities from both prospective and existing customers by learning about their needs and goals, discussing solutions the firm can provide, and ensuring a smooth sales process throughout.

Why Willis Johnson & Associates?

Willis Johnson & Associates is a fast growing, award winning, wealth management firm specializing in corporate executives and professionals. We help our clients optimize everything in their personal financial lives from compensation and benefit strategy to tax mitigation, from retirement planning to investments and insurance. And with everything we recommend, we put our clients first—all the time, every time. No product sales. No commissions. Straight fee-only financial planning and asset management.

The same way we take care of our clients, we invest in our team. Aside from providing a very competitive benefits package including fully paid medical, dental, vision, disability/life insurance, 401(k), and PTO, we pride ourselves in supporting personal and professional growth. We encourage and incentivize continued education for all employees and support their participation in educational conferences and events. We're tech forward and trust our team to get their jobs done without micro-managing. As such we let them work where they want, at home, or in the office.

Essential Responsibilities

- Over 50% of the day-to-day job activity is warm calling and emailing
  - Expectation of 250+ calls and 50+ customized emails per week
- Make out-bound phone calls to prospects in order to:
  - Schedule an initial meeting,
  - Get feedback on initial meetings and schedule follow-up meetings
  - Register to attend a firm event, and/or
  - Add contact info to firm touchpoints (Outbound Marketing Communications)
  - Build a respectful, long-term amiable rapport with prospects and clients (to nurture prospect referrals) in preparation for a potentially long sales cycle
- Make out-bound phone calls to all prospects before and after an Initial meeting is set; coordinates with available Wealth Management advisor to answer prospect technical questions while on the call
- Actively prequalify prospects before scheduling meetings to ensure qualification standards are met and advisors have sufficient data in advance of meetings to best identify value add opportunities.
- Maintain, refine and build upon existing prospect and out-bound marketing communication lists
- Coordinate with Director of Marketing to support marketing campaigns, promote attendance at events and own the sales cycle with all prospects produced by marketing and client referral efforts

- Stay within all industry compliance rules and regulations for all incoming/outgoing communications; and stay continually up-to-date on rules as they change from year to year
- Research client connections to target optimal target prospective client through LinkedIn
- Identify potential referrals for clients to Wealth Management advisors in advance of semi-annual client meetings
- Handle objections effectively by providing alternate solutions the firm provides for new clients and recommending targeted relevant content to facilitate future conversion by conveying the firm's differentiating value proposition
- Prep Wealth Management Advisors on prospects before they come in, debrief with them afterwards, and document all relevant data in CRM
- Produce regular weekly activity reports and monthly metrics reports using firm CRM
- Attend weekly Cases-In-Motion and bi-monthly Marketing meetings

Qualifications

- Bachelor's degree or equivalent
- 1 to 2 years' experience, investments or financial advisory industry experience preferred
- Proven inside sales experience
- Track record of over-achieving quota
- Strong phone presence and experience dialing dozens of calls per day
- Detail-oriented with strong project management and prioritization skills; must be able to handle multiple stakeholders and projects simultaneously while maintaining quality work.
- Excellent verbal and written communication skills

Preferred

- LinkedIn prospecting and networking experience is a plus.
- 2 to 3 years investment or financial advisory industry experience would be a great advantage.
- Interest in obtaining Series 65, CFP®, CFA® or CPA to develop knowledge of investing and financial planning – We sponsor and incentivize employees for all of these certifications and support financial planning conferences as well.
- CRM and marketing automation platform experience preferred.

What We Offer

- Work/Life Balance. For Real
- Collaborative, Positive Teammates
- Advancement Opportunities
- Autonomy in Your Role
- Professional Development Options
- Rewarding Work That Matters

Compensation & Benefits

- Salary range: $50,000-$65,000/year Base
    - Plus, uncapped quarterly bonuses based on achieved goals.
- 401(k) plan with opportunity to earn up to 7% the first year and 10% with tenure.
- Best and brightest leaders will have opportunities to buy into and become owners in the firm over time.
- 10 paid holidays and 15 PTO days to use at your discretion.
- Employer paid Health/Dental/Vision insurance premiums for individuals and families.
- Employer HSA contributions
- Employer paid Life and Long-Term Disability

To Apply- Because we are looking for an exceptional candidate to be the next member of our team, our team participates in the selection process. To apply, please email your resume and over letter to jobs@wjohnsonassociates.com with your full name, followed by "Inside Sales" in the subject line.