

Business Development Analyst

Clearwater Advisors is a boutique fixed income asset manager based in Boise, Idaho. Our clients include public and private corporations, state and local governments, endowments, foundations and high-net worth individuals. Clearwater Advisors aims to provide transparent, best-in-class service for and advice to our clients. We are focused on creating long term relationships of trust, often functioning as an extension of our clients' internal investment teams. This work includes participation in strategic discussions, creation of value-additive investment strategies and collaborative problem solving. We aim to be the first external call when our clients encounter a challenge or issue within their investment mandate.

We are currently looking to hire a Business Development Analyst to contribute towards the execution of our growth strategy. This position will include a combination of traditional prospecting (phone calls, emails, general idea creation, etc.) and sales pipeline progression (advisory work, customized idea generation, problem solving, etc.). Close collaboration with our portfolio managers, senior sales team and other individuals at the firm will be required. This position will include a competitive pay package and benefits.

Responsibilities:

- **Learn:** Become proficient in current capital markets knowledge – specifically fixed income.
- **Generate:** Create sales opportunities (meetings and calls) by phone calling prospective clients as well as through market research, product development and other creative methods/campaigns.
- **Coordinate:** Drive prospect project/solution work forward by coordinating between portfolio managers and the sales team.
- **Nurture:** Maintain and advance brand and prospect relationships.
- **Support:** Assist senior sales team by creating marketing materials, maintaining sales database, producing internal sales reports, etc.
- **Expand:** In a small firm, there are always opportunities to grow your career and expand your skill set beyond your day-to-day responsibilities. You will be expected to contribute to the overall growth and success of Clearwater Advisors.

Desired experience and skills:

- **Grit, drive and a determination to succeed**
- **Self-starter and ability to work both independently and in a team:** As a boutique asset manager, we do not have a large sales team with an established sales infrastructure. We are looking for a creative, hard-charging individual that is willing to work extremely hard (i.e., hit the phones and email) and also extremely smart (i.e., time spent on a creative idea for prospective clients can increase your hit rates). If you only function in highly structured environments then this position is probably not for you. Because we are a smaller firm – the ability to work well and get along with others is imperative.
- **Fast learner with the desire to understand and work in the financial markets:** While previous finance experience or education is a plus, it is not required. The will and dedication required to learn, understand and excel in the finance industry is a must. This position is a fantastic opportunity for an individual with a knack for selling to enter the finance industry.
- **Strong communication skills:** Ability to convey Clearwater Advisor's investment philosophy, process and competitive differentiation at both a micro and macro level.
- **Analytical and problem-solving skills**
- **Previous sales (or other relevant) experience:** A career in sales is not for the faint of heart. As such, previous sales experience is highly desired.
- **Series 65:** The applicant will be required to pass the exam before any interaction with prospective clients.
- **Bachelor's degree**

If interested please send your resume, cover letter and a video (uploaded to YouTube or Vimeo) explaining or demonstrating why you think you would excel in this position to twisler@clearwateradvisors.com.