



**Position:** Inside Sales Associate

**Region:** Oakville, Ontario

### **Job Description**

The Inside Sales Associate's role is to prospect and cultivate relationships within the broker/dealer community, with the goal of increasing sales of Harvest Exchange Traded Funds, through a variety of outbound sales activities in partnership with the external wholesaler. The position will also be responsible for developing new contacts, servicing existing customers, sales administrative duties, managing the database, and maintaining daily reporting on the CRM/Salesforce.

### **Position Duties:**

- Work with wholesaler to identify, develop and strengthen relationships with financial advisors within a designated territory to increase sales/market share.
- Proactive outbound calls to schedule weekly meetings and/or book branch presentations for the regional Sales Director.
- Position Harvest ETFs to prospects and clients; as well as identify cross selling opportunities.
- Regional development activities; regular database updating in CRM/Salesforce database, promoting marketing initiatives and product campaigns (CE Credit Program, Monthly Product Updates, New ETF launches).
- Execute efficient and organized project management workflows for product launches and marketing campaigns.
- Work with the Sales Director regarding the regional business plan. Coordinate follow up and information flow to the various sales channels.
- Monitor the success rate of sales efforts in the region. Provide a weekly report of new activity and sales in the region.
- Service the needs of financial advisors by handling incoming/outgoing communications, such as product information or assistance.
- Office administrative duties.

### **Qualifications:**

- Knowledge of Exchange Traded Funds and Mutual Funds.
- Excellent communication skills, both oral and written.
- Detail and results oriented. Well organized, including the ability to work on spreadsheets and data management systems.
- Motivated and committed with desire to be successful.
- Effective time management skills.
- University/College degree desired.
- CSC certificate.
- Salesforce experience.

Interested applicants please forward their resume with a cover letter to [resumes@harvestportfolios.com](mailto:resumes@harvestportfolios.com).