BEAR MOUNTAIN CAPITAL

Business Development Associate

Bear Mountain Capital strives to provide top-tier investment management and financial planning services to clients. **Our goal is to consistently deliver value to our clients, taking heart in our client's satisfaction.** Bear Mountain Capital seeks an individual who likes to work in an efficient, organized, relaxed, self-motivated, and honest culture focused on our clients. In addition to the requirement listed below, a strong desire to learn and a healthy sense of humor is a must.

1424 Fourth Avenue
Suite 814
Seattle, WA 98101
TEL 206.420.3713
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Mission: Role exists to support Bear Mountain Capital's expansion efforts in the areas of new client development, partner development and operational development. Associate will focus on expanding existing client base through various means, including direct solicitation, referral development, networking and marketing efforts. Associate will leverage partnerships within industry to further Bear Mountain Capital brand and increase exposure. Associate will be directly involved improving operations to support continued client development

Objective Outcomes:

- Increase assets under management by meeting annual client acquisition targets.
- Secure and maintain four strategic partnerships with CPA's, estate planning attorneys or M&A firms annually.
- Increase Bear Mountain Capital exposure via social media, community outreach and organizational partnerships including:
    - Facebook exposure – increased network, improved content
    - Non-profit exposure – effective sponsorships with community outreach organization, financial-education non-profits and organization in the arts community.
    - Industry organization – technology networking conferences (WSA's, MIT forum)
- Increase operational efficiency by leveraging the following technologies:
    - Contact management systems (ACT!, Salesforce.com, etc.)
    - Excel spreadsheets and other MS Office programs
    - E-mail and outsource e-mail newsletters/mailgrams services (MailChimp)
    - Data and news reporting services (Thomson Reuters)

Desired Core Competencies:

- Self-motivated – defines personal and professional goals, works hard to achieve them without much encouragement from others.
- Personable – can develop and maintain, from scratch, interpersonal relationships with ease.

- Committed/Persistent – has continued drive to push through obstacles and hurdles, consistently to meet long-term objectives. Focuses on meeting objectives, despite setbacks experienced in pursuit of those objectives
- Service Minded – maintains a focus on careful and thoughtful handling of client affairs. Pursues client satisfaction as a primary goal of managing relationships.
- Detail Oriented – captures nuanced details of prospective clients personal life and financial affairs, and is capable of translating those details to the account and portfolio manager. Must also be able to relay economic and portfolio management philosophies to clients in a concise and details manner.
- Technologically Savvy – leverages technology, such as client relationship management systems, e-mail, spreadsheets, Facebook, LinkedIn and other technologies to stay on top of tasks. Is also equipped to identify new ways to leverage new and existing technology to meet objectives.

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Requirements:

- Undergraduate degree required; MBA, CPA, and/or CFA's preferred
- Minimum 3 years of professional experience (experience in Finance/Economics a plus, but not required)
- Minimum 2 years of previous business development experience
- Proficient in Microsoft Office products such as Word and Excel
- Working knowledge of E-mail (Thunderbird, Outlook) and Contact Management/CRM Systems (ACT!, Salesforce.com)
- Exceptional communication skills