QUEENS OAK
ADVISORS

Queens Oak is an SEC registered investment advisor headquartered in Charlotte, NC. We offer innovative and intelligently designed planning solutions and investment products for high net worth and institutional clients that leverage the comparative advantages through Discipline, People and Risk Management.

Job Description

Job Title: Wealth Management Business Development Officer
Reports To: Managing Partners
FLSA Status: Exempt

Summary: Responsible for helping the firm grow by reaching new clients and developing new business avenues.

Duties and Responsibilities include the following. Other duties may be assigned.

1. Primarily responsible for identifying and developing new client relationships.*
2. Coordinates the team of specialists to ensure success in closing the business.*
3. Increase assets under management for the firm.
4. Maintains primary responsibility for setting all appointments.*
5. Minor responsibility for servicing client relationships.*
6. Coordinates the team of service specialists to ensure highest level of client satisfaction.*
7. Conducts frequent communication with our centers of influence such as attorneys, certified public accountants, and community leaders.*
8. Keeps strategic alliances apprised of Queens Oak Advisors in an effort to ensure referrals are appropriate.*
9. Assists in the development of marketing tools including presentation books, newsletters, and email blasts.*
10. Works with team to ensure pipeline and sales reports are up-to-date using firm client relationship management platform.*

*Essential Function

11. Ensures that all regulatory compliance is maintained to the highest level and licenses are kept current.*

12. Fulfills all continuing education responsibilities.*

13. Provides Chief Compliance Officer with all required compliance requirements. *

14. Gets involved in community organizations and events that both serve the community and provide networking opportunities.

Qualifications:
To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Computer Skills:
To perform this job successfully, an individual should have knowledge of Microsoft Office. Familiarity with Envestnet/Tamarac platform and Fidelity Wealth Central is a plus.

Education/Experience:
Bachelor's degree (B. A. / B. S.) from four-year college or university; and at least five years in financial industry; or equivalent combination of education and experience.

Knowledge, Skills, and Other Abilities:
- Computer skills
- Time management skills
- Organizational skills
- Oral and written communication skills
- Professionalism

To apply for this position, please email your resume to Leila.Evans@Queens-Oak.com.

*Essential Function