



Job Title: Business Development Specialist

About Westmount

Since we established Westmount in 1990, our vision has been clear. Be an incubator for innovative thinking, whether that's being one of the earliest firms to adopt a business model that puts clients' interests first, embracing alternative investments like real estate and private debt, or providing leading-edge financial planning. There's something else: our people. Westmount strives to be a magnet for the top talent in wealth management by providing thoughtful mentoring, a supportive environment for growth and the freedom to pursue fresh new ideas on behalf of our clients. That mindset has allowed us to assemble one of the sharpest, most dynamic advisory teams in LA.

Responsibilities

The Business Development Specialist will work alongside Senior Business Development Officers (BDOs) to develop new client relationships through existing channels of business, which include centers of influence (CPAs, trust attorneys, pension administrators), and the firm's primary custodian. The Specialist will also help cultivate new channels of business by researching and creating new networking opportunities for the BDOs as well as expanding their own personal network.

The Specialist will work in tandem with the firm's BDOs in crafting and executing sales strategy, reaching out to COIs to convey the firm's messaging, reviewing prospective client portfolios, crafting and reviewing marketing materials, and setting up marketing events.

The Specialist will be trained and mentored by the BDOs to learn our investment methodology, messaging, and approaches to developing new business. We expect the Specialist to eventually be promoted to a BDO position at the firm.

Qualifications

- Bachelors degree
- 5+ years in the financial services industry
- Highly motivated and personable, with strong interest in business development
- Outstanding verbal communication and presentation skills
- ***Desirable:*** CFP designation, existing relationships with centers of influence

Interested candidates should send their resume to careers@westmount.com.