

GOLSAN SCRUGGS

BUSINESS DEVELOPMENT ASSOCIATE INTERN

General Job Description: Spread the word on insuring various types of Investment companies against claims of client and investor lawsuits to the Registered Investment Advisory (RIA) community throughout the U.S., ask for the opportunity to provide greater information, schedule a dialogue discussion, and perform coverage analysis. Assist in marketing support services, client services management, and general office tasks.

Essential Functions:

Perform new business telemarketing & prospect communication

- Seek out new clients by telephone
- Email correspondence with business appropriate writing
- Set telephone appointments on company calendar
- Use prospect software system
- Perform RIASURE coverage analysis and present to prospective customer by telephone
- All other client items necessary....

Assist RIA Producer Team with marketing support services

- Research and identify appropriate companies and individuals for prospecting purposes
- Update CRM software with current or corrected contact information
- Support the distribution of marketing information for specific RIA marketing initiatives
- All other marketing items necessary....

Assist RIA client services department with delegated tasks

- Assist with new and renewal policy issuance process
- All other client items necessary....

General tasks

- Answer telephone
- Complete faxes
- Scan client documents into agency management system
- Complete mailing of various items
- Communicate with supervisors and peers
- Establish and maintain interpersonal relationships
- All other client items necessary....

Supervision: General supervision: routine duties are performed with minimal supervision; standard practices or procedures allow me to proceed alone at routine work; occasional work is checked while in progress; work is reviewed upon completion. Formal mentorship program is established. Meetings set are performed on a team basis.

Other Duties and Responsibilities: Participate in proactive team efforts to achieve departmental and company goals.

Knowledge Requirements: Not required – but personal interest and knowledge of the investment securities world a plus to the position.

Education and Experience: Pursuit of a Bachelor's degree (B. A.) from four-year college or university; or one to two year related experience and/or training; or equivalent combination of education and experience. Pursuit of a Associate's (A. A.) or equivalent from two-year college or technical school; or six months to one year related

GOLSAN SCRUGGS

BUSINESS DEVELOPMENT ASSOCIATE INTERN

experience and/or training; or equivalent combination of education and experience may be acceptable depending on candidate.

Language Skills: Ability to read and comprehend simple instructions, short correspondence, and memos. Ability to write simple correspondence. Ability to effectively present information in one-on-one and small group situations to customers, clients, and other employees of the organization.

Reasoning Ability: Ability to apply common sense understanding to carry out instructions furnished in written, oral or diagram form. Ability to deal with problems involving several concrete variables in standardized situations.

Computer Operations: Basic personal computer skills

Planning/Organization: Prioritize tasks. Must possess a personal drive to achieve personal and company goals.

Work Schedule/Hours: Based upon availability. Office hours 8am-5pm, Monday-Friday.

CONTACT INFORMATION

Attn: Loren Penner
Golsan Scruggs
16325 Boones Ferry Rd Ste 101
Lake Oswego OR 97035
(503)244-0297
lpenner@golsanscruggs.com