Business Development Analyst - Job Description

Centura Wealth Advisory is hiring for Business Development Analyst. As a Business Development Analyst (BDA), you will perform a wide array of tasks. Your primary responsibilities would include: 1) researching and identifying new private investment opportunities for the firm, 2) developing and maintaining an ongoing list of potential investments (depth chart), 3) developing relationships with the sponsors, and 4) performing pre-screen analyses and phase 1 diligence to assess which prospects merit further due diligence. Additionally, you will develop a tracking system to manage and record updates to the prospect list and keep key stakeholders informed. It is expected that the BDA will become a contributing member of the firm's Investment Committee.

We are looking for a results oriented, driven team player who thrives in an environment where seeking new insight and improvement are the norm. This role requires you to have the ability to effortlessly switch between evaluating the investment sponsor as a whole and evaluating small and detailed pieces of data. As the BDA, you will play a critical hands-on role in the firm's growth and development.

In this role, you will work closely with the CIO, Advisors, Partners, Financial Planners, Marketing, Compliance, and the Investment Committee.

Roles and Responsibilities:

The key areas of responsibility include:

1. Maintaining Relationships with Investment Sponsors and Key Players in Private Investment markets
2. Research
3. Data Management & Interpretation
4. Reporting & Communications

Additional Success Factors:

You will be required to develop and maintain strong working relationships with all members of our team, custodians, third party managers, and consultants and other vendors. You will be delivering reports and other work products to internal and external clients, therefore, writing and presenting skills will be essential. This role requires efficiency in communication, data interpretation and diligence.

You will need to be comfortable with taking ownership of projects and executing them or seek assistance when required to deliver desired results. The role will also require documenting certain operational processes clearly in an ongoing effort to institutionalize all operations.

Qualifications & Experience:

- Experience & licensing:
    - 5+ years of financial services experience at an investment manager, brokerage firm, RIA or similar
    - Undergraduate degree is a must, preferably in finance, economics, or business administration
    - CAIA
    - Series 65 or 66

- Communication skills:
    - Excellent interpersonal relationship skills required
    - Highly effective oral and written communication skills required (45wpm typing skill min)
    - Able to prepare client facing communications in a professional manner (word, ppt)
    - High EQ - emotional intelligence is a plus

• Analytical skills:
  - Ability to read & decipher a multitude of data sets and then clearly tell the story
  - Understanding of business entities and their various structures

• Software usage & proficiency:
  - Microsoft Office: Excel, Outlook, Word, PowerPoint – required
  - Excel modeling and advance functions - required
  - Orion Advisor software (PMS, Eclipse, Astro) – preferred plus
  - Salesforce - preferred
  - Brokerage trading and account interfaces (eg: Veo, Fusion, etc)
  - Market databases and analytics (eg: Morningstar, Koyfin, Hidden Levers, ThinkPipes)

What we provide you:

• Competitive compensation includes:
  - Salary
  - Bonus

• Opportunity to contribute to a dynamic, fast-paced business that is experiencing rapid growth
• Open and supportive team-based environment
• Paid Time Off
• Full medical, dental, vision benefits

Centura Wealth Advisory, located in San Diego, is an SEC Registered Investment Advisory firm delivering innovative wealth management services to affluent families, business owners, and charitable organizations. Our skilled professionals have been crafting sophisticated financial solutions as a team since 2005, yielding total wealth efficiency and purpose to those looking to liberate their wealth.

We achieve this by focusing on our clients' needs, upholding the highest ethical standards, fostering a tradition of quality, and investing in the individuals who, together, form our team. In doing so we cultivate a culture of excellence visible throughout all facets of the company, our practices, and most of all, the work we do for our clients. You can find more information on our #1 Asset here: https://bit.ly/centuraseekingthebest