



Position Profile	
Position Title:	Relationship Coordinator (Financial Services)
Department:	Sales
Reports To:	Registrar
Role Description: Financial Services – Part Time	
<p>The Relationship Coordinator for Knowledge Bureau is responsible for engaging professionals from the financial services in discussions to take continuing education and professional development with self-study courses, <i>Distinguished Advisor Workshops</i> and the <i>Distinguished Advisor Conference</i>. The primary focus, during the months of May to January, is to:</p> <ol style="list-style-type: none">1. Significantly grow the Knowledge Bureau client base through active prospecting to individual practitioners, and small to medium sized practices.2. Maintain and nurture existing and new business to develop long term relationships and positively build the Knowledge Bureau name and reputation.3. Meet revenue targets set out for the Relationship Coordinator.	
Job Duties and Responsibilities:	
<ul style="list-style-type: none">• Lead efforts in contacting prospective students making calls.• Create a long term relationship with clients and their teams by establishing an academic path towards continuing education and professional development.• Prepare and verify timely and accurate sales reports.• Adhere to company policy and procedures and use the company's CRM process.• Maintain a commitment to the company's sales processes, values and business code of ethics.• Work collaboratively with the company home office team.	
Qualifications (Skills, Attributes, Experience, Education)	
<ul style="list-style-type: none">• Knowledge and experience within the tax & financial services industry.• Well-developed connections within the financial services industry a definite plus.• Knowledge of Knowledge Bureau course offerings and philosophy.• Previous sales and entrepreneurial experience an asset.• Self- motivated with strong organizational and interpersonal skills.• Highly customer centric – a love for providing exceptional customer service.• Strong verbal, written and presentation skills.• Proficient computer skills: Microsoft Office, Excel, Word, PowerPoint.• Post -secondary education and graduation from a Knowledge Bureau program an asset.	



Other

The right individual will be entrepreneurial, highly motivated, with a love of education and a desire to ensure that the tax & financial services industry is serving the needs of the client in a highly professional manner.

Compensation & Start Date

- Hourly wage
- Commissions on sales that exceed hourly wage draw
- Generous group benefits and vacations
- Position to start immediately

Apply by email with cover letter and CV to:

The President, Knowledge Bureau
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