



# Canterbury Consulting

## Job Posting - Business Development Associate

### About Canterbury Consulting

Canterbury Consulting is an independent investment advisory firm based in Newport Beach, CA, overseeing \$28.4 billion in assets as of June 30, 2021. Canterbury provides consulting services to tax-exempt organizations, including community foundations, educational endowments, religious organizations, arts and cultural foundations and health care organizations, as well as individuals and family offices. Founded in 1988, the firm designs and manages custom investment programs aligned with each client's goals. Canterbury acts as the investment office for its diverse clients and provides objective investment advice, asset allocation, manager selection, risk management, implementation, and performance measurement. Canterbury Consulting strives to deliver performance and service that exceeds the needs and expectations of its clients. Learn more about Canterbury at [www.canterburyconsulting.com](http://www.canterburyconsulting.com).

At Canterbury, collaboration and teamwork are at our core. We take pride in our high-caliber work, our 100% employee-owned independence, and our unwavering commitment to our clients. Canterbury Consulting is a 60+ person professional services firm that provides investment advice to clients with net assets ranging from \$20M to \$1B. Our clients are both tax-exempt and taxable, and invest in both traditional and alternative assets. Canterbury customizes each client's portfolio based on their needs, wants, risk preferences, and liquidity requirements. The average tenure of Canterbury's clients is 10+ years.

We are professionals who are passionate about helping our clients—endowments, foundations, healthcare organizations, and families—succeed in achieving their missions. In our view, we succeed only when our clients succeed.

### Business Development Associate

As a business development associate for Canterbury, you will help build and promote the Canterbury Consulting services and brand. You will play a key role in developing new relationships with institutions and individuals, from initial contact through client onboarding.

### Requirements

Strong interpersonal and communication skills

Work with consultants to identify potential clients and make initial presentations

Ability to source and close new business

Work with potential clients through the entire hire process

Knowledge of investments and financial services

Excellent communication skills with demonstrated writing proficiency

Work with the marketing team to complete Requests for Proposal (RFP's) from prospective clients

Collaborate across departments to complete marketing-related projects

Strong working knowledge of Microsoft Office Suite, with emphasis on Word, Excel, and PowerPoint

Demonstrated ability to manage time efficiently, work on multiple projects simultaneously, and prioritize responsibilities

Ability to fit into the culture of the firm, which places significant value on teamwork, integrity, strong work ethic, and exceptional client service

Four year degree preferably in economics, finance or business

The candidate must have 1 to 3 years' related experience

At Canterbury, we expect our associates to learn at a fast pace in a demanding environment, and to demonstrate excellent problem-solving and troubleshooting skills. From your first day on the job, you will be part of a highly professional team focused on collaboration and excellence.

Benefits package includes: medical, dental, life, disability and vision insurance; 401k program with a company match; profit sharing plan, CFA and other professional certifications sponsorship; 11 paid holidays and 17 days of paid time off the first year of employment.

Please contact: [careers@canterburyconsulting.com](mailto:ccareers@canterburyconsulting.com)

Website: [www.canterburyconsulting.com](http://www.canterburyconsulting.com)

Canterbury Consulting is located in Newport Beach, CA