

Business Development Manager

Candidates located in or willing to relocate* to the State of Michigan will be considered.

Credit Union Trust is looking for a growth oriented and entrepreneurial-minded business development manager to develop and implement strategies for increasing the volume of opportunities to present and deliver trust and wealth management services to Credit Unions and their members. The Business Development Manager will be expected to work closely with credit unions to educate, promote and encourage engagement with Credit Union Trust. An emphasis will be placed on developing and leveraging a consistent and documented process for coaching and educating referral partners, following up and reinforcing our value proposition.

The ideal candidate will have an ability to leverage existing relationships with clients, COIs (attorneys and CPAs) and others to further grow our client base. Success in the position will require efficient engagement with audiences across a broad geographic footprint, combining in-person, virtual and other methods.

The chosen candidate will participate in relevant committees, be a primary administrator of the CRM system and assume additional responsibilities to be determined.

All team members are expected to actively seek opportunities to support each other and the organization.

Qualifications, Knowledge and Skills

- Bachelor's degree in marketing, finance, accounting, or related field, or equivalent experience.
- FINRA Securities licenses and/or professional certifications (CTFA, CFP, etc.) preferred.
- Significant experience in working with or in financial institution branches or member centers preferred.
- Significant experience in sale of financial services and products required.
- Personal Trust experience preferred.
- Must be proficient in Microsoft Office Suite and in use of CRM software.
- Must possess attention to detail and an ability to multitask in a fast-paced environment.
- Must have outstanding verbal and written communication skills.

Physical Requirements

- Work involves eye strain from frequent use of computer screens and reading.
- Travel will be significant and varied, mostly, if not all, by personal motor vehicle. Ability to manage travel schedule for maximum efficiency is required.

About Credit Union Trust

Credit Union Trust is a limited purpose bank organized to provide trust products and services to credit union members and the public. Credit Union Trust is solely owned by Michigan credit unions. Credit Union Trust's products and services are designed to create, protect, and preserve wealth for individuals and their families.

***No relocation assistance is provided.**

This Position Description is not a complete statement of all the duties and responsibilities comprising the position.

Nothing in this Position Description restricts management's right to assign and reassign duties and responsibilities to this position at any time.