



Position: Business Development Representative (B2C)

Planswell uses patent-pending technology to create the most intelligent financial plans in the world, absolutely free. We enable people from all walks of life to align their investments, insurance and borrowing with their personal goals. To date, we have built over 150,000 financial plans for Canadians across the country and have raised over \$17.8 million in funding. Most recently, Planswell was named one of LinkedIn's Top Canadian Startups.

We're looking for a hardworking hustler to join us on our mission as a Business Development Representative!

About You

You've been working from an early age, knocking on doors, working at the mall, waiting tables, cutting lawns... whatever it took to afford a reasonable lifestyle growing up. You've worked in sales for a year or so and loved it. You have immense grit, and endless curiosity. You're looking for your big break - for someone to take a chance on you - and are ready to change the world.

What You'll Do:

- Make outbound calls to prospective and current clients (no lead generation required) - ensure that every Canadian who makes a free financial plan with Planswell is being contacted in a timely manner
- Initiate successful discovery calls to understand our prospective clients' financial situation and goals
- Set appointments for those seeking financial advice to speak with our Planning Professionals (Plan Pros).
- Do whatever it takes to ensure all our clients are enthusiastically satisfied and successful in achieving their goals





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- Collaborate with the team to develop and implement new business development and relationship building strategies
- Use a Customer Relationship Management (CRM) system to keep track of workflow

You Have:

- A strong desire to win, exceed performance expectations and build an impactful career
- Demonstrated excellent work ethic and achievements in past positions
- An amiable and friendly disposition; people naturally trust you
- Outstanding written and verbal communication skills
- An amazing attention to the finer details of life

Previous business development/sales experience is not required as our team will provide thorough training to set you up for success. Other opportunities for employee growth and development include weekly sales coaching, company-sponsored licenses/certifications, a career path to Planning Professional and Account Manager

To apply, please send your resumé to careers@planswell.com with subject line "Business Development Representative - {YOUR NAME}". As well, please take 15 minutes to complete our two-part Predictive Index assessment at <https://assess.predictiveindex.com/xYE1q> as a part of your application.



WE CAN'T WAIT
TO MEET YOU!