Designation: Manager- Business Development (US)

**Company Profile :**

**The Organization:**

Asset Vantage was founded in 2011 by a family office and technology group as a next-generation, SaaS technology-based asset management, accounting, and reporting system catering to the highly demanding needs of customers ranging from individual wealth holders to fully staffed family offices and those professionals that serve them. ***Our vision is to empower families and their trusted advisors to make better investment decisions with a complete picture of their wealth.***

Our fully configurable family office software platform provides financial data aggregation across all asset types, an integrated general ledger for accounting/reconciliation and comprehensive portfolio reporting/analytics across all asset classes, currencies, advisors, and geographies.  
***We are the one-stop software solution to help family offices run like a business.***

More than 300+ of the world’s wealthiest families, representing combined assets of over USD 300 Billion in value, use our platform to automate their operations to drive better financial outcomes. We serve them through single-family offices, multi-family offices, CPA firms, trusts and financial institutions. ***AV has the distinction of being the only platform that’s truly global serving users across the Americas, UK, Middle East, Asia, and Oceania.***

AV’s best-in-class technology, combined with its premium managed services, offers an unparalleled and highly configurable solution at a fully transparent and competitive price point. ***The holy grail of value that family offices have always been searching for is now here.***

For more information, visit [www.assetvantage.com](http://www.assetvantage.com)

**Job Roles and Responsibilities :**

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* Identify and pursue new business opportunities through direct outreach, networking, referrals, and industry events
* Drive end-to-end sales cycle including prospecting, presentations, solutioning, pricing, negotiations, and closure
* Develop a strong pipeline and regularly update CRM with detailed client interaction history and deal progress
* Understand client requirements and effectively position Asset Vantage’s SaaS platform as the ideal solution
* Collaborate with internal teams (Product, Marketing, Customer Success, & Implementation Team) to tailor offerings and ensure successful onboarding
* Represent Asset Vantage at industry forums, webinars, and conferences
* Build long-term relationships with clients and partners to ensure high satisfaction and explore upselling opportunities
* Stay informed about market trends, competitive landscape, and regulatory changes affecting the wealth tech space

**Technical Skills :**

* Prior experience dealing with HNWIs, wealth managers, family offices, financial institutions is essential
* Excellent communication, presentation, and interpersonal skills
* Proven track record of achieving revenue and client acquisition targets
* Self-starter with strong business acumen and the ability to work independently
* Willingness to travel domestically and internationally as required

**Education:**

* Bachelor’s degree in Business, Finance; MBA is added advantage
* 5–8 years of experience in B2B sales, preferably in SaaS, or WealthTech Industries

**Location:**

**USA: Stamford- Connecticut / New York**