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 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.

340 of the world’s wealthiest families, representing combined assets of over USD 400 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.

Asset Vantage’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.

**Job Roles and Responsibilities :**

* Identify, qualify, and engage potential clients within the US market, including family offices, CPA firms, wealth managers, and financial institutions
* Lead the full sales cycle — from prospecting and needs analysis to demos, solutioning, negotiation, closing and collection
* Develop a deep understanding of Asset Vantage’s platform and articulate its value proposition to senior stakeholders and decision-makers
* Build and maintain a strong pipeline using CRM tools and generate regular reports on pipeline health and progress
* Collaborate with internal teams (Solutions, Product, Marketing, Implementation Team & Customer Success) to ensure smooth onboarding and post-sale success
* Represent Asset Vantage at US-based events, webinars, and conferences
* Stay updated on trends in the US family office, private wealth, and financial technology sectors

**Technical Skills :**

* Prior experience working with US- clients, especially in the private wealth or family office space, is strongly preferred
* Exceptional communication and presentation skills with the ability to engage and influence senior decision-makers
* Proven track record of meeting or exceeding sales targets in a consultative selling environment
* Comfortable working flexible hours to align with US time zones
* Self-motivated, detail-oriented, and capable of working independently as well as part of a global team

**Education:**

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

**Location:**

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