



Relationship Manager

CEG Worldwide

About Us

CEG Worldwide is dedicated to helping financial advisors transform their practices into simple, elegant wealth management businesses that make them indispensable to the right affluent clients. We believe that financial advisors can build amazing lives of significance by serving fewer, wealthier clients extremely well, and that they can do it faster and with less effort than they ever thought possible.

Financial advisors engage us to enhance their client impact, increase their net incomes and improve quality of life for all stakeholders.

Job Title

Relationship Manager

Job Summary

This Relationship Manager position provides an outstanding opportunity for top performers working from their homes with our fast-growing virtual company.

The Relationship Manager leverages their comprehensive understanding of CEG Worldwide's events and services. This role works closely with Clients, Prospects and Teammates and must have a 'can-do' attitude and show a high degree of customer focus.

CEG uses a consultative, soft-sales approach. Most leads are pre-qualified. However, cold calling to our qualified database is also a requirement. The Relationship Manager will contact prospective clients via phone and email to invite them to attend our virtual conferences and then follow up after the event to offer our coaching programs.

This is a remote, independent contractor position. Candidates must be able to dedicate a minimum of 80 hours per month to building strong client relationships.

Primary Responsibilities

- Identify new business opportunities and prioritize pursuits
- Conduct warm and cold sales calls using our automated Playbooks system
- Develop and maintain relationships with prospective and existing clients
- Execute an organized, efficient and structured sales process

Qualifications

- Previous sales experience is a must
- Home office with the ability to work without interruption, computer and reliable high-speed internet access
- Technology savvy: proficient or proven ability to quickly grasp CRM system (Salesforce.com), Playbooks, Word, Zoom, Excel and PowerPoint.
- Bachelor's degree preferred
- Superb writing and presentation skills

Other Skills/Knowledge

- Financial Services industry knowledge is a plus
- Excellent interpersonal skills
- Execute an organized, efficient and structured sales process
- Proven success in sales
- Ability to think strategically and solve problems
- Energetic team player
- Results oriented with ability to prioritize to enhance performance
- Ambitious and goal-focused
- Confident, organized and articulate
- High level of integrity