CORDA
TOGETHER WE'RE INVESTED

Company Overview

CORDA Investment Management, LLC is a client-centered wealth management firm serving high-net-worth individuals and families. We bring together investment management, financial planning, and tax strategy in one integrated, proactive approach.

Registered with the SEC under the Investment Advisers Act of 1940, CORDA upholds the highest standards of integrity and fiduciary responsibility.

At CORDA, our team shares a common purpose: helping clients navigate complexity, build confidence in their financial future, and leave a meaningful legacy. We are a close-knit, collaborative team. We support each other and welcome new ideas, while staying focused on the clients we serve. If our work resonates with you, we'd love to connect!

Business Development / Financial Consultant

We're seeking a business development-minded financial advisor professional who's ready to identify new business opportunities and foster relationships with both institutional partners and prospective clients. You will serve as the primary point of contact for institutional partners in our referral network and communicate our value proposition to those partners and prospective clients.

In a client-focused, team-centered environment, you will work closely with all areas of the firm as a contributor to growing client relationships. This role requires passion for helping people, being comfortable in a financial advisory or consultative role, and business development acumen.

We pride ourselves on a collaborative culture that puts the client's interest first in every decision.

Location: Dallas

Position Type: Full-Time

Essential Duties & Responsibilities

- Proactively identify and engage prospective high-net-worth clients; execute strategies to meet and exceed firm growth goals.

- Build and nurture deep relationships with institutional and business partners to maximize referral flow.
- Conduct high-level consultations and presentations to demonstrate CORDA's value and align our services with prospective clients' long-term goals.
- Build trust, simplify complex financial concepts, and close new business within a team-centered environment.
- Partner with our Financial Planners, Financial Advisors, and Portfolio Managers to ensure a seamless transition from prospect to client.
- Maintain a sophisticated command of financial markets, retirement strategies, and regulatory trends to effectively mitigate risk and advise prospects.
- Utilize CRM (Salesforce) and Microsoft 365 to track pipeline activity and manage outreach efficiently.

Education & Experience

- 3+ years of successful experience in financial services, specifically in a client-facing or business development capacity.
- Active Series 65, or a combination of Series 7 and 66.
- Bachelor's degree (B.A./B.S.) from an accredited institution.
- Proficiency in Salesforce (preferred), Excel, and the Microsoft 365 suite.
- Exceptional communication skills, a high degree of emotional intelligence, and a proven track record of achieving sales targets.