

Business Development Intern

ORGANIZATION BACKGROUND

UI Charitable Advisors' mission is to enable investment advisors to help their clients give more impactfully. We work with strategic partners such as financial advisors, investment professionals, accountants, and trust and estate lawyers to set up charitable vehicles that meet the needs of their clients.

At UI Charitable, our team members are valued and respected for who they are - with opportunities to bring their entrepreneurial spirit and talents to increase giving around the world. We have an inclusive, supportive, collaborative culture that makes UI Charitable a great place to work.

POSITION OVERVIEW

BD Intern will be responsible for contributing to improving the prospecting processes and standards, by consistent delivery and testing. This position is responsible for the accurate and timely management of the daily activities related to sales enablement and reporting.

DUTIES & RESPONSIBILITIES

- Create and manage cold and warm prospecting campaigns (primarily via email)
 - Expand current cold prospecting efforts (Reply.io.)
 - Explore new outreach opportunities and fine tune current strategies
- Coordinate and develop content for financial advisors, donors, and other partners
 - Perform research to help create shareable materials for partners
- Assist in process of accepting donations of more complex assets
- Business performance reporting and analysis

The above list is not exhaustive; additional tasks may be assigned as necessary. As an Intern, you will need to manage several projects simultaneously.

SKILLS & QUALIFICATIONS

- Excellent organizational skills
- Experienced multitasker
- Committed to methodically testing sales and marketing campaigns
- Collaborative team player
- Developed quantitative reasoning and research skills
- Strong problem-solving and independent thinking
- Confident and demonstrated communication skills

REQUIRED SKILLS/ACTIVITIES:

- **Administrative Skills:** Proficient in office applications such as Google Workspace and have experience using or the desire to learn to use other applications.
- **Communication Skills:** This role requires strong written and verbal communication skills, as the Intern will need to liaise with both internal teams and external programs.
- **Project Management Skills:** The Intern should be capable of handling multiple projects at once, prioritizing tasks, and meeting deadlines. This also includes the ability to coordinate and communicate with various project leaders.
- **Analytical Skills:** The Intern should be able to interpret data, draw conclusions, and present findings clearly and concisely.
- **Problem-Solving Skills:** The ability to solve unforeseen problems quickly and effectively.
- **Desire to Learn:** The Intern should have a strong desire to learn and understand the ins and outs of the UI Charitable tools and programs and their role in achieving social impact.

- **OTHER:**
 - Strong organizational and time management skills.
 - Capable of multi-tasking and keeping others well-informed
 - Skilled problem-solver
 - Both a team player and capable of independent work
 - Detail-oriented, highly organized with the ability to multitask
 - Must possess unquestioned personal integrity and reliability; keep commitments, admit mistakes, accept responsibility for all departmental output and results, maintain confidentiality when necessary and appropriate, and act in the organization's best interests at all times.
 - Experienced with database or processing work
 - Success in meeting deadlines

EDUCATION & EXPERIENCE

- Intern may be in the process of achieving a degree.

PHYSICAL REQUIREMENTS

- Prolonged periods of sitting at a desk and working on a computer

OUR VALUES:

UI Charitable is committed to achieving our mission and vision by upholding and promoting the following guiding principles:

- **Growth Mindset:** Continuous learning and innovation is at the heart of how we work. We celebrate progression.
- **Think Big:** We innovate to connect and scale philanthropic aspirations. We work to solve the largest problems and exist to foster measurable impact for our customers and each other.
- **Share, Listen, Grow Together:** Express ideas, issues, and thoughts with one another in a steady, honest, and reliable manner. We welcome and encourage feedback from one another.
- **Happy Warrior:** We strive to bring out the best in ourselves and others. Despite challenges, we stay positive and approach them with a sense of fun and fulfillment.

EQUAL EMPLOYMENT OPPORTUNITY

UI Charitable offers fair and equal employment opportunity to all qualified job candidates regardless of age, race, religion, color, sex, marital status, sexual orientation, gender identity or expression, arrest record, conviction record, physical disability, developmental disability, national origin, membership in the National Guard, state defense force or any other reserve component of the military forces of the United States or Utah, genetic information, marital status, or any legally protected status.

If interested, please send your resume to hyrumgrenny@uicharitable.org