



# Institutional Wealth Business Development Officer I

Dallas, TX, US

Req ID: 67881

Apply here: <https://jobs.bokf.com/Bank-of-Texas/job/Dallas-Institutional-Wealth-Business-Development-Officer-I-TX-75201/878675600/>

**Job Location:** Sherry Lane and Fort Worth Dallas TX

**Areas of Interest:** Business Development; Institutional/401(K) Services; Investment Management; Investment Sales; Marketing; Relationship Management; Sales; Trust; Wealth Management

**Colorado Base Salary Range:** Not Available

**BOK Financial (BOKF)**, Headquartered in Tulsa, Oklahoma, BOK Financial Corporation (NASDAQ: BOKF) is a top 25 U.S.-based financial services holding company with operations in ten states – Oklahoma, Texas, Arkansas, Arizona, Colorado, Kansas/Missouri, New Mexico, Nebraska and Wisconsin. The company began more than 100 years ago in Tulsa and has successfully diversified into a variety of industries, businesses and geographies.

## **Bonus Type**

Formula Based

## **Summary**

If you are looking for a job that combines a passion for innovation, an opportunity for growth, and a culture of teamwork, then you've come to the right place. We have an exciting opportunity awaiting someone like you!

## **Job Description**

This position is primarily responsible for new business development, through referrals or direct contact, of employee benefit plans, investment management, and custodial relationships.

## **Team Culture**

We achieve more together by being involved, committed, and collaborative. We respect, honor and praise one another for a job well done. We celebrate each other's wins, big and small.

## **How You'll Spend Your Time**

- You will be responsible for bringing in new Institutional Wealth business to the bank.
- You will follow up on referrals from internal partners: Commercial, Corporate Banking, Treasury, Private Wealth etc.
- You will attend and host meetings with prospective clients on a monthly basis.
- You will make outbound calls, attend networking/community events with the intention of generating new Institutional Wealth business

## **Education & Experience Requirements**

This level of knowledge is normally acquired through completion of a Bachelor's Degree and 1-3 years' experience with a trust department/company in administering and/or selling employee benefit plan services or equivalent work related experience of 7-9 years.

- Sales aptitude/self-motivated/goal oriented
- Ability to work effectively as part of a team in solving a client's needs and problems
- Quote new business based on department guidelines.
- Good knowledge of general marketing principals
- Basic knowledge of investments and products and services specifically for use in qualified plans
- Good communication skills and ability to prepare and deliver persuasive oral and written reports and presentations
- Proficient PC skills including word processing and spreadsheet applications

**BOK Financial** is a stable and financially strong organization that provides excellent training and development to support building the long term careers of our employees. **With passion, skill and partnership you can make an impact on the success of the bank, our customers and your own career!**

**Apply today** and take the first step towards your next career opportunity!  
**If you are interested in a career with BOK Financial text "BOKF" to 25000 to engage with Olivia our virtual recruiting assistant.**

**BOK Financial is an equal opportunity employer. We are committed to providing equal employment opportunities for training, compensation, transfer, promotion and other aspects of employment for all qualified applicants and employees without regard to sex, race, color, religion, national origin, age, disability, sexual orientation, genetic information or veteran status.**

**Please contact [recruiting\\_coordinators@bokf.com](mailto:recruiting_coordinators@bokf.com) with any questions.**