

Sebastian Murphy

Contact: +61 402 757 871 || Sebastian.J.Murphy@gmail.com

Business Development specialist with experience in the Australian financial market sector, skills ranging from retail investment sales to high end Asset Consulting sales. Currently seeking exposure to Singapore financial markets to broaden my knowledge and development.

Identified as an emerging leader with three years sales experience, my passion for financial services, investments and markets makes me a valuable team member. I thrive in a challenging role where client requirements and problem solving are the focus, allowing me to build strong relationships and deliver results.



EDUCATION

University of Technology, Sydney

Masters of Finance (Continued)

2012 - 2016

Bachelor of Business, Sports Management

2009 - 2012

- Elite Athlete Sporting Scholarship – Rugby Union

St Ignatius College, Riverview

Higher School Certificate

2001 - 2007

CAREER SUMMARY

JANA Investment Advisers

April 2015 - Present

Business Development Executive

April 2015 – Present

Key Responsibilities:

- Manage and complete all end to end sales process for new business and key clients
- Pipeline, strategy, engagement, agitation, solution, pricing, transition of assets, credentials and pitch responsibilities
- People leader duties, part time staff member reporting responsibilities
- Deliver Fortnightly presentation to the business on sales channel progress of key opportunities
- Sales pipeline strategy updates to wider business development team (as required)
- Alongside the Head of Global Equities, was JANA's client contact for New South Wales Treasury Corporation (Central financing agency for the New South Wales public sector) - \$62 Billion of assets under advice, Marquee client. Asset allocation, manager monitoring, quarterly reporting, attendance at meetings and ad hoc request for fund advice
- Deliver Quarterly updates including reports to Tender Consultants on the JANA business
- Engage with NAB Wealth Directors on prospects (monthly and as required)
- Contribute to Private Health Insurance strategy (bank Driven) – Shared clients across the NAB and JANA
- Manage all external engagements regarding JANA marketing, conferencing, partnerships, and ancillary opportunities
- Coordinate annual JANA Conference (wider business) – event management
- Deliver best practice service to new business and client engagement
- General business support around investment queries and business

Key Responsibilities:

- Assisting a core team of Advisers providing Superannuation, Pension and Investment account management
- This included assistance amongst investment options, Term deposits, Managed funds, direct shares, executing orders and general administrative assistance
- Core group of advisers who had retail clients with combined portfolio value in excess of \$100 million
- Client facing engagement around changes to portfolio's and confirmation of lifestyle arrangements
- Identified as an emerging leader in the team – coached younger members
- Drive relationships with NAB advisers for sales channels
- Drove engagement of digital online solution
- Seconded Team Leader (3 months)
- Strong sales results, FY 13-14 sales of \$1.3 million for Sydney group
- Top conversion rate of 81% for FY 13-14 investment and superannuation sales

PERSONAL ATTRIBUTES

- Energetic and passionate with a high degree of work integrity and attention to detail
- Effective communicator with a reputation as a valuable team member and strong presenter
- Adaptable and resilient to varying challenges including high pressure work environments
- Highly motivated and driven to deliver on goals and objectives
- Can-do attitude towards problem solving with accountability

TECHNICAL SKILLS

Advanced in:

- Factset
- Microsoft Excel, Word, PowerPoint, Outlook
- Sydney University Professional Business Writing and Presentation course
- Oracle Financial Management suite
- Salesforce
- Adobe

ADDITIONAL INFORMATION

| | |
|-------------|---|
| Committees: | The Association of Superannuation Funds of Australia (ASFA), Emerging Leaders Committee |
| Mentions: | National Australia Bank, Wealth Emerging Leader Group |
| Other work: | Volunteer Coach at Little Legends Rugby (2009 – Present) |
| Interests: | Equities (domestic market), reading, fitness, financial markets, rugby, mentoring |

References: ***Available on request***