



Business Finance Advisor

Position Overview

The Business Advisor has a multi-faceted role within the Client Services Team. They are responsible for developing and delivering relevant, cutting-edge, quality entrepreneurial programs and services focused on all aspects of finance and accessing capital to WBDC clients to achieve optimal economic impact outcomes. The Business Advisor will be responsible for educating clients and staff on the elements of financial management and accessing capital for businesses of all sizes. Key knowledge areas include: financial accounting, access to capital from traditional and nontraditional sources, preparing to access capital, and helping clients to identify the right source of capital for them and their business, etc.

This person will also be responsible for engaging clients, volunteers, and the community. This position is a key contributor for enhancing and maintaining WBDC's strategic competitiveness as the preferred provider of entrepreneurial training in Connecticut.

This position is up to 10-15 hours per week. WBDC is currently operating and delivering services virtually. Once normal operations resume, the role will be based in WBDC's Stamford, New Haven or New London office. Travel to the three WBDC offices and other training sites in the state is required. WBDC requires all employees to provide proof of full COVID-19 vaccination. Qualified individuals seeking an exemption from this vaccination requirement may apply for a medical or religious exemption. The compensation is paid hourly with the rate in the range of \$35 – 40/hour commensurate with experience.

Duties and Responsibilities

- Develop, enhance, and deliver WBDC's programming around financial management and access to capital; recruit guest speakers and advisors; counsel and guide clients on financing topics and strategy; advocate and encourage business plan development; review business plans and provide clients with constructive, actionable feedback
- Enhance and deliver WBDC entrepreneurial financial management and access to capital programming through live and on-demand training and one-on-one business advising
- Advise and assist clients on all aspects of launching and/or scaling a small business and financial management
- Enhance existing offerings and develop new programs to address changing client needs and economic conditions for new and established business owners
- Develop/maintain working knowledge of online business planning tools and utilize them in classes and counseling sessions
- Develop/maintain working knowledge of micro enterprise and small business programs in Connecticut and nationally
- Develop/maintain a working knowledge of latest tools available to provide entrepreneurs with enhanced financing opportunities to build their businesses
- Assist Program Team with WBDC's Opportunity Fund Program, including providing pre- and post-funding technical assistance and reporting
- Administer client follow-up to boost client engagement and collect outcomes

- Complete required data for compliance on a timely basis, within 48 hours after each class/ counseling session; collect client evaluations and testimonials; contribute to client success stories
- Develop and maintain relationships with community partners and lenders around Connecticut
- Manage financing programmatic volunteers; develop and maintain relationships with volunteers, including vetting volunteer instructors, counselors, and advisors; work with team to ensure seamless tracking and reporting
- Represent and assist at WBDC programs and events
- Represent WBDC at partner events and meetings
- Other duties as assigned

Qualifications

- Bachelor's Degree in business, finance, accounting, or relevant field; Master's in Business Administration; or related field preferred
- Minimum 5 years professional experience in the fields of small business management, economic development, or micro-enterprise, with experience delivering training and counseling/coaching to small business owners strongly preferred
- Small business lending or investing experience
- Experience in external affairs and community outreach
- Excellent communication, writing, organizational and decision-making skills
- Excellent presentation/public speaking skills to small groups
- Proficiency with Microsoft Excel, PowerPoint, Outlook, and Word
- Sensitive to the needs of a diverse client base
- Availability to work occasional evenings and/or weekends as needed
- Must have own transportation as this position requires travel between locations

About Us

Headquartered in Stamford with regional offices in New Haven and New London, WBDC is the statewide leader of entrepreneurial education for women. For over 20 years, we have provided women with the skills, resources, and networks to succeed in business. WBDC has supported economic development by assisting in the creation, sustainability, or expansion of more than 6,500 businesses and 8,750 jobs, and helping businesses to access more than \$18,000,000 in loans and grants.

How We Operate

We are a small team of over 25 talented individuals who collectively deliver outstanding results through a high level of passion and commitment.

Please apply if you:

- Possess an *Entrepreneurial Mindset* – creative, motivated, enthusiastic, and energetic
- Seek to inspire and empower those around you, whether they are clients or colleagues
- Thrive in a culture of teamwork and growth, and value collaboration
- Are highly detailed, and can see the big picture while working in the day-to-day
- Take initiative, and demonstrate a sense of urgency in setting and meeting deadlines
- Are passionate about supporting women entrepreneurs and small business owners

How to Apply

Interested candidates who excited by this opportunity should email their cover letter, resume, and salary requirements to resumes@ctwbdc.org. List WBDC BUSINESS FINANCE ADVISOR in the email subject line. No phone inquiries.

Disclaimer

The statements herein are intended to describe the general nature and level of work being performed by the employee in this position. They are not intended to be construed as an exhaustive list of all responsibilities, duties, and skills required of a person in this position.

WBDC, Inc. Equal Employment Opportunity Statement

WBDC is committed to creating a diverse environment and is proud to be an equal opportunity employer. We welcome qualified applicants to receive consideration for employment without regard to race, color, religion, gender, gender identity or expression, sexual orientation, national origin, genetics, disability, age, or military status.