



Role Profile

Business Development Manager (BDM)
Internal - Yorkshire and the North East area

Location

Gloucester, GL3 4AH

Salary

£40,000 per annum

Contract

Permanent / Full-time

Blackfinch Group is an award-winning investment specialist with a heritage dating back over 25 years. A trusted provider, we work in partnership with advisers. Our businesses cover tax-efficient solutions, early stage investing, managed portfolio services, property financing and renewable energy. As an environmental, social and governance (ESG) investor, we work for a positive impact. We're proud to be entrusted with over £600 million in assets under management and administration.



Purpose of Role

To support the business' growth and its development by working in partnership with aligned External BDMs and the wider teams; hunting new advisers, and building and maintaining relationships with new and existing intermediaries. This role will assist the External BDMs with IFA meetings, ensuring that BDMs have the marketing collateral they require for IFA meetings and presentations/seminars as well as any supportive information.

The role requires the development of non F2F (phone and video conferencing) adviser relationships and BDM panel activity to increase the Blackfinch footprint and inflows.

Blackfinch is committed to insuring that all of its dealings have a positive impact on Environmental, Social and Governance (ESG) issues and as signatories to the Principles of Responsible Investing it is committed to influencing positive impact to the United Nations Sustainable Development Goals. You have a responsibility to make yourself aware of the Blackfinch ESG Policy and be prepared to study and pass the relevant ESG qualifications.

Key Accountabilities

- Input into and support in the delivery of a joint sales plan with your aligned External BDM(s).
- Working collaboratively with your External BDM, hunt and build new relationships with prospective intermediaries.
- Develop and maintain existing relationships to increase business levels in line with targets set out in the Blackfinch Business Plan.
- Provide technical support for all inbound intermediary enquiries.
- Reviews DDQ requests from your External BDM or Advisers; part completing them prior to their submission to the Technical team. Ensuring the DDQs are completed and returned within a reasonable timeframe.
- Keep intermediaries up to date with Blackfinch products, literature, practices and procedures.
- Assist in pre and post meeting support for your External BDM. Implement sales and marketing campaigns as required.

Experience & Skills

- Maintain the CRM system and ensure all relevant panel information is kept up to date.
- Maintain accurate records of activity on the CRM system.
- Provide a very high level of client service.
- Consistently improve product and industry and environment knowledge.
- Attend and support Blackfinch conferences and seminars as required.
- Improve and maintain internal processes to ensure that client service delivery is seamless and slick.
- As a minimum achieve the gateway KPIs set out by the business.
- Undertake all other tasks commensurate with this level of role.

Essential Experience

- Ideally be experienced within the financial services sector or professional services environment
- Have 1-2 years experience of working in a B2B Sales role
- Have 1-2 years proven ability to build and expand a client database
- Have 1-2 years proven experience of being pro-active and achieving /exceeding sales KPIs/targets
- Have 1-2 years experience in using a database and CRM systems
- Have 1-2 years experience of demonstrating good analytical skills
- Have a good working knowledge of all Microsoft programmes

Essential Skills

- Have excellent communications skills and ability to present information clearly and concisely to individuals and groups.
- Work collaboratively and in partnership with your BDM - External to present a united team approach to your joint accounts.
- Demonstrate ambition and be driven to succeed.
- Have a strong and flexible work ethic.
- Have and demonstrate exceptional organisational and planning skills.
- Maintain a resilient attitude.
- Demonstrate at all times exceptional interpersonal skills in all interactions with clients and colleagues.
- A willingness to study role specific materials and courses and to develop personally and regularly through internal and external training and exams.

Essential Qualifications

- Hold a minimum 2:1 degree or equivalent professional / academic qualification.
- Hold or be working towards / be prepared to study and pass the exam for the RO1 within probation.
- Hold or commit to studying all 6 modules of the CII Diploma level qualification over a defined period.

If you believe you have the skills and experience for this role, we'd be interested to hear from you.

Apply by sending your CV and any other supporting documents to **HR@blackfinch.co.uk**

If you require any further information about this role, we're here to help, contact us on 01452 717070.

Our Values

At Blackfinch we're working to make a difference in the world. We partner with advisers to meet client and business aims. Inspired by the work of Charles Darwin, we're named after one of Darwin's finches, which influenced his theories of evolution.

Our values of 'adapt', 'evolve' and 'thrive' run through everything we do. We continually adapt to changing markets, providing evolved products so that our customers can thrive. These values inform our work as an ESG investor, working towards a more sustainable future.



Offering a supportive environment, championing continuing professional development and sponsoring staff for qualifications.



One of the friendliest businesses in financial services, supporting our people, customers and investee companies.



Providing opportunities to progress plus to take up benefits, and to get involved in sponsorship and charity work
