



### **Role Profile**

Business Development Support

### **Location**

Gloucester, GL3 4AH

### **Salary**

£18,000 - £25,000pa

### **Contract Type**

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 £550 million in assets under management and administration.



## Purpose of Role

To support the business' growth and development you will work in partnership with aligned Internal and External Business Development Managers (BDM) and the wider team hunting new advisers, maintaining the CRM system and ensuring that all relevant panel information is kept up to date. Alongside providing an excellent standard of service, the role requires acquiring a high level of technical knowledge of all Blackfinch products which your aligned Internal BDM will support you with.

The role requires working collaboratively with the Internal BDM's assisting with the development of non F2F (phone and video conferencing) adviser relationships.

This role is a great introduction to the exciting world of Blackfinch Investments, and for the right candidate it is expected that a key metric of success is that individuals gain a solid understanding of the products and business initially, with a view to moving on inside the business over the medium to long term.

## Key Accountabilities

- To support with the delivery of the Sales Plan that your aligned Internal and External BDMs have in place for their region.
- Gathering data from campaigns and events, converting this data into a useable format for your aligned Internal BDM.
- Using industry recognised databases, locator sites and other search engines to generate contact lists for your aligned Internal BDM.
- Researching data found to ensure that the relevant strategic partner positions have been taken into consideration.
- Inputting any new data found onto the CRM system and updating it with additional information when bulk amendments are required.
- Dealing with general enquiries such as answering inbound calls, emails and comms queries in an accurate and timely manner whilst also delivering an exceptional level of customer service.
- Actioning literature requests from your aligned Internal and External BDMs.
- Generating illustrations, valuations and CPD certificates.
- Proof reading email templates and other relevant documents when requested.
- Preparing for events, liaising with venues, generating attendee lists and preparing marketing and literature collateral for them.
- Assisting your aligned Internal BDM with first stage technical queries.
- Welcoming visitors to the office and working alongside the Client Resources team as and when required.

## Essential Skills & Experience

- Ideally be experienced within the financial services sector or professional services environment.
- Have 1 year's experience of working in a B2B Sales role.
- Have 1 year's proven ability to build and expand a client database.
- Have 1 year's experience in using a database and CRM systems or like from academic studies.
- Have 1 year's experience of demonstrating good analytical skills or like from academic studies.
- Have a good working knowledge of all Microsoft programmes.
- Have excellent communications skills and ability to present information clearly and concisely to individuals and groups.
- 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

- Either hold or be prepared to achieve during your first 6 months the CF1 qualification.

If you think you have the skills and experience we're looking for, we would love to hear from you. Please upload your CV and record responses to a few questions using the 'APPLY NOW' button below. The hiring manager for this opportunity will review your CV and responses and will contact you shortly.

[APPLY NOW](#)

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

---