



Role Profile

Financial Analyst

Location

Gloucester, GL3 4AH

Salary

Competitive

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

Form a key part of the Technical department, providing support to the Technical Team and other areas of the business as required.

Key Accountabilities

- Review and complete product-related questionnaires from external stakeholders.
- Prepare responses to queries about our products.
- Maintain up-to-date information on all our products across a range of peer comparison reports.
- Review product literature before publication.
- Prepare regular and ad hoc performance figures.
- Prepare reporting from FE analytics, including:
 - Performance charts.
 - Comparisons of prospective clients' existing portfolios against our models.
 - Regular calculation of portfolio OCFs.
 - Dividend yield calculations.

Essential Skills & Experience

- Highly organised, with good time management.
- Self-motivated and disciplined.
- Attention to detail.
- Good communication skills.
- Strong logical and analytical skills.
- Good level of numeracy.
- Ability to quickly assimilate new and complex information.
- Proficiency in Microsoft Excel.

Desirable Skills & Experience

- Financial analysis.
- Understanding of personal taxation e.g. IHT, Income Tax, CGT.
- Understanding of tax reliefs and exemptions e.g. Business Relief, EIS, ISAs, VCTs.
- Basic understanding of UK regulatory environment.
- Some exposure to relational databases or CRM systems such as Salesforce.
- FE Analytics experience.

Essential Qualifications

- Numerate qualification. Degree or equivalent preferred.
- Entry-level investment management qualification for example IMC or equivalent.

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
