



Role Profile

Product Specialist

Location

Gloucester, GL3 4AH

Salary

£40,000 - £60,000

plus an AUM linked bonus (defined) and discretionary for new accounts onboarded

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 £600 million in assets under management and administration.



Purpose of Role

Blackfinch Asset Management are seeking a candidate to act as primary champion and subject matter expert for our range of multi-asset portfolios. Working closely with the Investment Directors, as well as distribution and marketing, the Product Specialist will take a key role in product messaging, competitive analysis, product training, investment updates, client interaction and facilitating and coordinating investment-related information flow both internally and externally. While positioned within the multi-asset team, this proactive role will provide you with exposure to the wider business and the opportunity to service and influence key stakeholders.

The ideal candidate will be able to demonstrate exceptional analytical and data interpretation skills and be confident in their ability to utilise this to craft marketing themes and articulate product messaging across a variety of media, as well as having strong presentational skills.

As part of a close-knit team, you will also be expected to assist other members of the team when required and have a willingness to be part of future product developments.

Key Accountabilities

- Craft and articulate product stories and messaging for a multi-asset portfolio range.
- Create and maintain relevant product narrative to differentiate from peers and manage performance expectations including marketing language, RFP content, pitch books and web messaging.
- Maintain consistent, up to date knowledge on market developments, market news and new investment products and launches.
- Provide on-going updates and product training around pertinent product features, benefits, and performance updates for all distribution channels on the multi asset portfolios.
- Provide support to the wider distribution team by taking the lead in pitches to potential clients where opportunities have been identified.
- Provide regular investment updates to clients and key stakeholders.
- Engage with clients across all channels via conference calls, on site visits, due diligence meetings, and travel for in person meetings for new business or ongoing client servicing.
- Proactively identify product marketing opportunities based on industry trends, current market environment and competitive advantages.
- Identify opportunities and provide detailed competitive analysis both proactively and reactively to help drive sales.
- Build product sales ideas and drive content for marketing collateral.
- Collaborate with the Investment Directors to identify opportunities for product promotion throughout the year.

Skills & Experience

- Coordinate with Marketing to ensure product messaging flows through and is consistent across all collateral and platforms.
- Undertake any other duties commensurate with this level of role as requested by either the Investment Directors or Blackfinch Senior Management Team.
- 3 years+ experience in financial services sector.
- Demonstrate a good understanding of multi-asset/collective investment structures.
- Possess exceptional problem solving skills, along with excellent communication skills both written and verbal.
- Through high levels of professionalism, demonstrate the ability to build strong relationships and influence key stakeholders.
- Ability to drive ideas from concept to completion through efficient project management and execution.
- Have excellent communications skills and ability to present information clearly and concisely.
- Strong presentational skills in both one-to-one and group scenarios.
- Experience working in a client-facing role with financial intermediaries or institutions.
- Experience in data interpretation from sources including: Morningstar Direct and FE Analytics.
- Strong numerical and analytical skills with extensive Excel experience and the ability to adapt easily to new systems.
- Ability to manage workloads effectively and efficiently.
- Ability to work to tight deadlines/under pressure with minimum supervision.
- Have a keen interest in equity and other public market investments and analysis
- Have a strong and flexible work ethic.

Essential Qualifications

- Relevant industry qualification from a recognised provider to demonstrate a strong understanding of financial products and markets AND/OR:
- Relevant Bachelor's degree.

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
