



Role Profile

Ventures Technical Analyst

Location

Gloucester, GL3 4AH

Salary

up to £30,000 (DOE)

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

An exciting opportunity to join a passionate and growing Venture Capital team of former start-up founders within Blackfinch that invests in early-stage technology companies.

As a Ventures Technical Analyst you will be on the front line in responding to client advisers, analysts, and business development teams regarding the Ventures products and investments. You'll help prepare client updates and product literature, and monitor our performance and positioning against competitors. At times you will also contribute to the investment work of the Ventures team.

This is an important role in a dedicated, hard-working Ventures ecosystem with good opportunities to develop.

Key Accountabilities

- Review and complete product-related questionnaires from external stakeholders.
- Prepare responses to queries about our products.
- Draft product literature and supporting material.
- Help prepare client updates.
- Create and maintain relevant performance information.
- Contribute to third-party reviews of our products.
- Maintain up-to-date information on our products compared to competitors.
- Build and maintain an understanding of current interests and concerns of clients and external stakeholders.

Skills & Experience

Essential Skills & Experience

- Good communication skills, especially fluent writing.
- Strong logical and analytical skills.
- Attention to detail.
- High levels of organisation and discipline, with excellent time management.
- Good numeracy.
- An ability to quickly assimilate new and complex information.
- Proficiency in Microsoft Excel.
- An entrepreneurial mindset.

Desirable Skills & Experience

- An understanding of personal taxation, including inheritance tax, income tax, and capital gains tax.
- An understanding of tax reliefs and exemptions, especially EIS and VCTs.
- A basic understanding of the UK regulatory environment.
- Some exposure to relational databases or CRM systems such as Salesforce.
- Experience working in a professional services environment.
- Experience of product marketing.

Qualifications

- Entry-level investment management qualification such as the IMC (or similar) is desirable.

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
