

## JOB DESCRIPTION

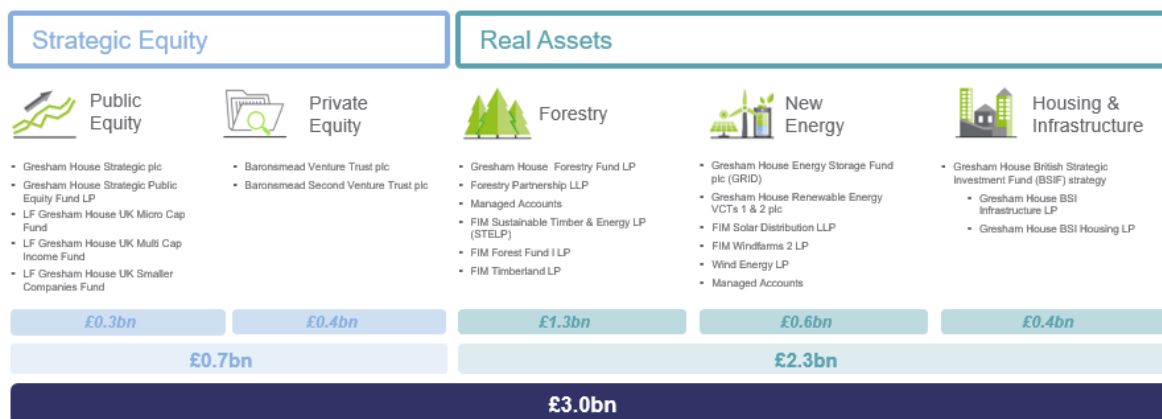
<b>Position Title</b>	Institutional Sales Associate
<b>Position reports to</b>	Head of Institutional Business
<b>Salary</b>	Competitive
<b>Location</b>	London

### Business Overview

Gresham House is a specialist alternative asset manager providing funds, direct investments and tailored investment solutions, including co-investment across a range of highly differentiated alternative investment strategies. Our expertise includes strategic public, private equity (private assets), timber, renewable energy, housing and infrastructure. We aim to deliver sustainable financial returns and we are committed to building long-term partnerships with our clients to help them achieve their financial goals.

In December 2014, a new management team led by CEO Tony Dalwood set out to transform the former property focused investment trust into a specialist alternatives asset management business. Through a combination of acquisitions and organic growth, the team is delivery on its objectives and now has c.100 employees working in London, Oxford and Perth in Scotland. From a standing start in December 2014, through a combination of acquisitions and organic growth, the Gresham House Business has grown exponentially, with assets under management now at £3.0 billion (5 March 2020) providing a strong and scalable platform from which to continue to grow.

### The business divides into two divisions - Strategic Equity and Real Assets:



The company is built around a long-term value investment philosophy and private-equity techniques, and has a core team of experienced, committed and highly capable investment and business managers with strong track records of building asset management businesses.

### Role Objective

The group's products and services target a range of clients across HNWI, family offices, charities, endowments and institutional investors including local government pension schemes. There is a requirement to strengthen the institutional sales and distribution teams under the leadership of the Head of Institutional Business.

- An exciting role in a fast-growing specialist alternative investment manager
- To provide executive support to the Business Development Director and Head of Institutional Business in all sales and client service activity, including maintenance of CRM & pipeline data, production of presentations, conducting prospect research and updating consultant databases

### Key Responsibilities / Accountabilities

- Assist and support the institutional sales team (3 people) with the preparation and follow up on prospect and client meetings

- Provide solid administrative assistance relating to sales activity within the team, including preparing presentations and pulling together first drafts of RFPs using the RFP database
- Ensure that new RFP responses are loaded up onto the RFP database
- Support the consultant relations activity including preparation for research/ due diligence meetings, populating consultant databases and ad hoc consultant requests
- Provide support to client reporting and ad hoc client requests
- Ensure the CRM system is kept up-to-date and all prospect and client communications are recorded.
- Working with compliance to approve deliverables as well as presentations and such other sales materials
- Management of projects as the team requires
- Develop a strong product knowledge

### Key Relationships

- Institutional distribution team
- Investment teams
- Legal & Compliance
- Back office and support staff

### Skills & Experience

- At least 2 years' experience within financial services
- Experience creating presentations and completing databases
- Understanding of financial products, pensions and investments
- High level of written English and drafting skills
- University degree or equivalent
- Competence in Excel, Word, and CRM systems.
- Excellent written and verbal communication skills
- Strong organisational and time management skills, ability to multi-task

### Personal Attributes

- Highly organised approach to work, systematic and logical thinker
  - High levels of attention to detail applied to all tasks, thoughtful and reflective
  - Ability to work under pressure and meet strict deadlines in a fast-paced, deadline-driven environment
- Professional and disciplined approach with strong levels of self-motivation and drive
  - Excellent interpersonal skills, team player

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