

## JOB DESCRIPTION

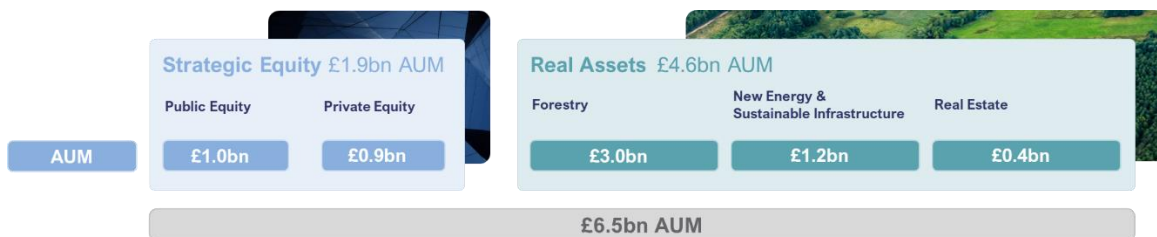
<b>Position Title</b>	Sales Support Analyst, Strategic Equity
<b>Position reports to</b>	Divisional Finance Director
<b>Salary</b>	TBC
<b>Location</b>	London
<b>Position type</b>	Permanent

### 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.

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 c.£6.5 billion, (31 December 2021), providing a strong and scalable platform from which to continue to grow. The team is delivering on its objectives and now has c.180 employees working in London, Oxford, Dumfries and Perth in Scotland and Dublin.

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



1. As at 31 December 2021

### Role Objective

An exciting role in a fast-growing specialist alternative investment manager. The candidate will be required to provide executive sales support to all funds in Strategic Equity team, including sales and shareholder activity, updating relevant systems, assistance with preparing RFPs/DDQs, co-ordinating and arranging relevant meetings and events.

### Key Responsibilities / Accountabilities

#### *Public Equity*

- Ensure shareholder information and data including but not limited to fund holdings and contact details is up to date and accurately recorded in SAM by liaising with Financial Clarity and the platforms.
- First point of contact for all platforms for general activity including onboarding new platforms as required
- Providing monthly inflow and outflow data for all funds to sales team and Gresham House as required.
- Ownership of preparation of RFP/DDQ's
- Ensuring RFP database is kept up to date
- Running sales activity and pipeline reports directly from SAM.
- Ownership of NDA process including ensuring NDAs are authorised by Ken Wotton/sent to the legal team and the divisional log maintained
- Coordinate monthly IFA presentations/factsheets alongside finance/marketing team
- Public equity IFA events (at least one a quarter)
- Diary support for Wholesale Distributions team (3 members)
- Organise public equity roadshows (2/3 per quarter)

#### *Private Equity (VCTs)*

##### *Fundraising support (ad hoc)*

- Arrange VCT IFA meetings/roadshows
- Ensure IFA/Wealth manager contact details are up to date and accurately recorded in SAM
- Ownership of preparation of RFP/DDQ's
- Ensuring RFP database is kept up to date
- Coordinate IFA presentations/factsheets alongside finance team
- Coordinate VCT reviews when fundraising (Tax Efficient Review/Micap/SJP/Allenbridge)
- IFA support (point of contact for questions)

##### *Other support*

- Organise VCT AGMs/Investor day
- SE Regional events – network/advisor dinners for GHV (12 forecast a year)
- SE London events – network/advisor dinners

##### *Other responsibilities*

- Coordinate/build relationships with sales team/finance and operations/marketing to support the growth of the strategic equity division through growth in AUM

### Skills & Experience

- Sound technical knowledge of the Funds industry
- Strong interest in the growth of the funds under management
- Strong ability to understand and evaluate information
- Previous related industry experience essential
- Excellent verbal and written communication skills
- Ability to work independently

### Personal Attributes

- Be efficient, reliable and thorough
- Drive and initiative - the desire to add value, proactive approach
- Fast paced - ability to work on a variety of tasks with tight deadlines
- Commitment to the business and the team
- Strong intellect - the ability to analyse and distil information quickly and effectively
- Able to communicate effectively and adapt to anyone within the broader team

*Gresham House is an equal opportunities employer and encourages all qualified candidates to apply regardless of their racial, ethnic, religious and cultural background, gender, sexual orientation or disabilities. Gresham House is dedicated to encouraging a supportive and inclusive culture amongst all our employees.*

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