

<b>Job Title:</b> Investment RFP assistant	<b>Reports to:</b> Head of Marketing
<b>Department:</b> Marketing	<b>Location:</b> Guildford or London
<b>Job Holder:</b> One Year Fixed Term Contract	<b>Effective Date:</b> July 2021
<b>Senior Manager / Certification Regime:</b> Conduct Rules	

We are looking for an Investment RFP Assistant to join our Marketing team to provide additional support on a one year fixed term contract. The successful candidate will be based at either our London or Guildford office with some travel to the other location.

If you are interested in applying for this role, please send your CV (together with details of current salary) to Niamh Dempsey, HR Director [niamh.dempsey@premiermiton.com](mailto:niamh.dempsey@premiermiton.com)

Premier Miton was formed in November 2019 from the merger of Premier Asset Management Group plc and Miton Group plc. Our merger has brought together the capabilities, expertise and knowledge of two highly regarded companies to create a new organisation that is even better placed to deliver the right outcomes for our clients.

Premier Miton focuses on two principal areas of investment expertise: outcome-based, multi-asset investment, and single-strategy, active equity investment, for example UK, European, US and global equity funds. The diversity, strength and depth of our product range allows us to offer portfolio solutions for a wide range of client needs.

Our business is centred on managing our clients' money. We aim to meet their needs by offering strong investment products and delivering sustainable long-term outcomes, underpinned by responsive client service and transparent, proactive communication.

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#### **Job Purpose / Job Objective**

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- To work alongside the RFP team of two to assist in the production and update of Request for Proposal documents (fund questionnaires), due diligence questionnaires and external RFP databases for Premier Miton's range of funds, trusts and portfolios, including the company's own documents as well as those received from external companies for completion.

## Principal Responsibilities / Deliverables

Responsibility	Associated Tasks / Deliverables
<b>RFP updates</b>	<ul style="list-style-type: none"> <li>• Work with the RFP team within the marketing team, and other internal departments (including business development, investment, operations, compliance, risk, legal, investor services) to update, as per the agreed schedule, the standard Request for Proposal (RFP) documents for Premier Miton's product range,</li> <li>• Complete RFP, due diligence and other related requests submitted to the team from external companies within the agreed timescales, ensuring all relevant parties are updated with regular progress reports</li> <li>• Ensure timely update of external databases of Premier Miton product information (e.g. AssetQ, Mercer, Evestment)</li> <li>• Liaise with internal departments to ensure delivery to agreed deadlines</li> <li>• Produce regular reporting on progress and status</li> <li>• Ensure compliance with Premier Miton's RFP production procedures</li> <li>• Compliance with Financial Conduct Authority rules and the principles of treating customers fairly when producing and updating RFP documents</li> <li>• Any additional RFP and due diligence requests.</li> </ul>
<b>Individual Conduct</b>	<ul style="list-style-type: none"> <li>• Act with integrity.</li> <li>• Act with due care, skill and diligence.</li> <li>• Pay due regard to the interests of customers and treat them fairly.</li> <li>• Observe proper standards of market conduct.</li> </ul>

## Education, Experience, Skills and Abilities

	Essential/ Desirable
<b>Education / qualification</b> <ul style="list-style-type: none"> <li>• Degree level (or experience accepted in lieu of qualification)</li> <li>• qualifications)</li> </ul>	D
<b>Experience / knowledge</b> <ul style="list-style-type: none"> <li>• Understanding of the relevant FCA compliance rules and the principles of treating customers fairly and an ability to ensure these rules and principles are embedded in day to day work</li> <li>• Experience of working in a similar role for a period of at least 3 years</li> <li>• Knowledge and/or interest in investments</li> </ul>	D D E
<b>Skills</b> <ul style="list-style-type: none"> <li>• Good communication &amp; interpersonal skills</li> <li>• High level of accuracy and attention to detail</li> <li>• Strong organisational skills and organised approach to work</li> <li>• Strong understanding of regulatory environment;</li> <li>• Able to use own initiative and prioritise workloads and timescales</li> </ul>	E E E E
<b>Characteristics</b> <ul style="list-style-type: none"> <li>• Ability to work under pressure and adhere to strict timescales.</li> <li>• Ability to work in a team but with a high level of work autonomy</li> </ul>	E E