

<b>Job Title:</b> Business Development Administrator	<b>Reports to:</b> Business Development Operations Manager/Business Development Administrative Lead
<b>Department:</b> Business Development Support	<b>Location:</b> London

Premier Miton Investors is a UK based asset management firm with £12.8 billion of assets under management (March 2022) in a broad range of investment products, with offices in London and Guildford.

The successful candidate will work within a team of Business Development Administrators and report to the Business Development Administrative Lead, to provide a co-ordinated administrative function and support for the Business Development Operations Manager and Business Development team; as well as provide support to the Investment Relations team and Business Development Managers and Consultants.

If you are interested in the role, please send your CV (together with details of current salary) to:

Emma Burgess, HR Associate  
[HR@premiermiton.com](mailto:HR@premiermiton.com)



### Premier Miton's purpose and values

To actively and responsibly manage our clients' investments for a better financial future

Dedicated

Passionate

Responsible

Independent

Collegiate

<b>Principal Responsibilities / Deliverables</b>	
<b>Responsibility</b>	<b>Associated Tasks / Deliverables</b>
<b>CRM System</b>	<ul style="list-style-type: none"> <li>• Update CRM system (Salesforce) with Business Development Manager / Consultants' Voicenotes and follow through on the agreed action points, such as sending post-meeting emails.</li> <li>• Monitor Voicenotes and send reminder emails to ensure they are completed within deadlines.</li> <li>• Update the CRM system with event attendee details from Salesforce campaigns within agreed timescales.</li> <li>• Monitor the Salesforce Inbox &amp; maintain CRM system as required.</li> <li>• Processing Connect registration forms on Salesforce</li> <li>• Any other ad-hoc CRM requirements as and when required</li> </ul>
<b>Reports / Analysis / Information Requests</b>	<ul style="list-style-type: none"> <li>• Use Financial Express Analytics to create performance, risk information and comparative information against key competitors on the range of Premier Miton funds.</li> <li>• Deal with ad hoc fund / product information requests received from IFA's, Wealth Managers and retail clients;</li> <li>• Assist in collating and distribution of Business Development meeting actions.</li> <li>• Co-ordinate Private Client report requests.</li> <li>• Produce weekly KPI, availability, proposal, winners and losers, new opportunity reports.</li> </ul>
<b>Support Business Development Team</b>	<ul style="list-style-type: none"> <li>• Processing meeting follow-ups for the Business Development Managers;</li> <li>• Collate all weekly and bi-annual Business development call planners</li> <li>• Assist Business Development Managers and Marketing with mailshots;</li> <li>• Liaise with meeting venues for Business Development Manager events.</li> <li>• Process and log all Non-disclosure agreements.</li> <li>• Monitor team outlook inboxes.</li> <li>• Process Business Development team expenses via relevant systems.</li> <li>• Manage and update campaigns via Salesforce end to end.</li> <li>• Produce CPD certificates post events.</li> <li>• Co-ordinate meetings schedules and appointment requests from Business Development team for fund manager attendance.</li> <li>• Manage travel and accommodation arrangements and itineraries for Business Development Team as and when required.</li> <li>• Process all non-monetary benefit forms as and when required.</li> <li>• Prepare presentation and marketing material as and when required.</li> <li>• Provide general support and any other ad hoc requirements to the Business Development Team, as required.</li> </ul>
<b>Conduct</b>	<ul style="list-style-type: none"> <li>• Act with integrity.</li> <li>• Act with due care, skill and diligence.</li> <li>• Be open and co-operative with the FCA.</li> <li>• Pay due regard to the interests of customers and treat them fairly.</li> <li>• Observe proper standards of market conduct.</li> </ul>
<b>Other</b>	<ul style="list-style-type: none"> <li>• Attend internal meetings, as required;</li> <li>• Assist the Business Development Director, UK Business Development Manager and Business Development Operations Manager with Projects, as required.</li> </ul>

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**Education, Experience, Skills and Abilities, etc.**

	<b>Essential / Desirable</b>
<b>Education / Qualification</b> <ul style="list-style-type: none"> <li>• Relevant qualification (experience accepted in lieu)</li> </ul>	E
<b>Experience / Knowledge</b> <ul style="list-style-type: none"> <li>• Experience of distribution in an asset management environment</li> <li>• Experience of CRM systems</li> </ul>	D E
<b>Skills</b> <ul style="list-style-type: none"> <li>• Ability to work on own initiative;</li> <li>• Excellent organisation, prioritisation and time management skills;</li> <li>• Excellent communication skills – both written and verbal;</li> <li>• Strong diplomacy and networking skills;</li> <li>• Highly proficient in Microsoft Office, particularly Excel</li> </ul>	E E E E
<b>Characteristics</b> <ul style="list-style-type: none"> <li>• Ability to work under considerable pressure and adhere to strict timescales.</li> <li>• Attention to Detail</li> </ul>	E E

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**Other Information**

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- Some travel required to attend relevant meetings, generally in the UK
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