

Company Overview

Premier Miton is a genuinely active investment manager offering a range of funds and investment trusts, as well as a portfolio management service, covering equity, fixed income, multi asset and absolute return investment strategies. We have approximately 160 employees split across our Guildford and London offices, with hot desks available, our colleagues spend time in both offices which gives great exposure to all parts and levels of the business.

Our culture defines how we aim to work in an ethical and constructive way to meet our objective of acting responsibly and doing a good job for our clients and other stakeholders. All our employees sign up to a code of ethical and professional conduct which means they are expected to conduct themselves with integrity and honesty in an open and transparent manner and support our core values.

Internal Sales Executive

We are looking for an Internal Sales Executive to join our Sales team based in our London office.

This role will entail promoting Premier Miton products through proactive calls, meetings, and events. Developing relationships with financial intermediaries and answering queries about our product range and services. In addition, collaborating with the regional sales Director and Manager(s) to secure asset flows and support internal sales initiatives.

If you are interested in the role, please send your CV together with details of your Right to Work in the UK to:

Recruitment@premiermiton.com

Job Description

Key responsibilities

Responsibility	Associated Tasks / Deliverables
Monthly Objectives	<ul style="list-style-type: none">• To achieve new business objectives as defined by the Head of Internal Sales & Client Service, in conjunction with team-wide objectives set by Global Head of Distribution.• To achieve KPIs in relation to number of pro-active calls and other points of contact promoting the Premier Miton product range, as directed.• To arrange an agreed number of face-to-face meetings around events if attending.• To maintain accurate records of activity on the CRM system.
Sales	<ul style="list-style-type: none">• Attend conferences, regional events and host meetings as required to promote the Premier Miton product range, as directed.• Maintain and develop relationships with financial services intermediaries (predominantly Financial Advisers - both Directly Regulated and Appointed Representatives, and Wealth Managers).
Technical Knowledge	<ul style="list-style-type: none">• Answer technical queries from financial intermediaries on the Premier Miton product range and other services provided by Premier Miton;• Develop and maintain strong technical knowledge of relevant Premier Miton products to aid proactive prospecting and to handle reactive sales enquiries.
Sales Team	<ul style="list-style-type: none">• To work alongside the Regional Sales Director and Regional Sales Manager(s) in the assigned region with the objective of securing net asset flows from new and existing supporters as well as increasing the supporter base and assist with asset retention.• To provide support within the Internal Sales Executive group, as required.• Be an active participant in internal sales meetings and contribute where appropriate to increase knowledge, share objection handling challenges for personal development and to aid the development of others.
Individual Conduct	<ul style="list-style-type: none">• Act with integrity.• Act with due care, skill and diligence.• Be open and co-operative with the FCA.• Pay due regard to the interests of customers and treat them fairly.• Observe proper standards of market conduct.• Act to deliver good outcomes to retail customers.
Other	<ul style="list-style-type: none">• Any other responsibilities as required from time to time.

Education, experience, skills & abilities

Education / Professional Qualification	<ul style="list-style-type: none"> • Preferably Level 3 qualified, or above, or other industry-recognised qualification.
Experience / Knowledge	<ul style="list-style-type: none"> • Significant experience working in a sales-based role in an asset management company, selling to financial intermediaries such as Financial Advisers and Wealth Managers. • A strong working knowledge of different products, not limited to open-ended and closed-ended funds and model portfolios. • A strong knowledge of investment products and financial markets and the ability to apply this knowledge effectively to communications when promoting equities, fixed income, absolute return and multi asset funds/trusts, alongside model portfolio services. • A solid understanding of Compliance frameworks.
Competencies / Skills	<ul style="list-style-type: none"> • High degree of IT literacy & MS Office applications. • Very strong mathematical, analytical and numeracy skills • Ability to communicate clearly and effectively – both written and verbally. • Strong interpersonal and influencing skills. • Ability to plan own workload effectively as well as strong organisational and planning skills. • Detail oriented with a structured approach to tasks. • Understanding of regulatory environment. • Advanced Microsoft Excel capabilities.
Characteristics	<ul style="list-style-type: none"> • Ability to work under pressure and adhere to timescales. • Ability to work in a team but with a high level of work autonomy. • A diplomatic & respectful manner when dealing with colleagues, senior management and third parties; listens carefully and deploys sensitive presentation and influencing skills to establish credibility. • Maintains absolute integrity and confidentiality; is trustworthy, honest, credible and reliable. • Consistently adopts a professional manner.