

A black and white photograph of a person in a red dress jumping over a large, stylized chevron graphic that is colored in shades of red and orange. The background shows a blurred landscape with trees and a building.

PACIFIC ASSET MANAGEMENT **SALES SUPPORT ANALYST**

Pacific Asset Management (PAM) is a fresh and progressive asset manager, rethinking the conventions of how asset management works for advisors, institutions, investors, asset owners and the industry.

We are responsible for over \$22.8 billion* of assets for our clients which comprises Single Manager strategies and technology enabled Adviser Solutions. We seek to deliver to our clients and partners through an innovative and progressive lens pushing the boundaries of technology, operational and investment research.

JOB TITLE: SALES SUPPORT ANALYST

We are looking for a Sales Support Analyst to support the wholesale team with a wide variety of office-related tasks in a dynamic and fast-paced environment.

POSITION OVERVIEW:

- Primary responsibility is to support the wholesale sales team with business development activities.
- Identify new and relevant prospects for the strategies.
- Develop a close working relationship with other areas of the business, including middle and back offices to streamline reporting processes. The expectation will be to lead projects that aim to create reporting efficiencies and improvements.
- Preparation and dissemination of client reporting data and materials – Including but not limited to Investor Reports, Holdings Data, Attribution, Liquidity Data etc.
- Collaborate with colleagues on completion of investor DDQs, RFIs and RFPs on an ad-hoc basis.
- Assist / Shadow wholesale sales team during meetings & engagements with current and prospective investors.
- Assist / Shadow wholesale sales team during roadshows and / or other events.
- Regularly maintain and update generic materials such as strategy/fund/firm level DDQs.
- Maintain AuM and client flow data across the business and breakdown of the Funds.
- Update databases including Evestment, Mercer GIMD, Alphaport etc for all single manager funds with fund and firm level information.

- Complete applications for consultant mandates – This can be via an online portal or email correspondence with consultants.
- Maintain a strong understanding of the performance and positioning of the strategies in order to effectively communicate this to prospective and existing investors.
- Upload the single manager funds onto relevant platforms to improve client access to the Funds – For example Transact, Aegon, Abrdn etc.
- Maintain directory of activities relating to client services via the CRM.
- Assist in maintaining the wholesale and institutional sales pipelines, interacting with the technology function of the business to improve efficiency.
- Maintain a database of regular client reporting requirements and fulfil these in a timely fashion.
- Actively seek new opportunities for the sales team via LinkedIn, company research Fundpath etc

MARKETING ROLES AND RESPONSIBILITIES:

- Working with the marketing team to prepare marketing materials.
- Assisting in the sourcing, planning and organisation of events attended by the wholesale team both internal and external.
- Distribute Marketing Materials as needed.

REQUIREMENTS:

- Strong communication and interpersonal skills, with the ability to effectively collaborate with colleagues at all levels of the organisation.
- Ability to work independently and prioritise tasks in a fast-paced environment.
- High level of integrity and professionalism.
- Two years experience in a sales support role within financial services

BENEFITS:

Competitive salary package
Discretionary bonus
Pension scheme
Health insurance
Death in service
Income protection
25 days annual leave

PLEASE GET IN TOUCH

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