

# Casterbridge

## JOB DESCRIPTION

**Job Title:** Business Development Manager

**Location:** Home based, with travel and use of Salisbury and Putney offices

**Salary:** £65,000-£75,000 dependent on experience

**Reports To:** Head of Distribution/Managing Director

**Responsible for:** Sales & Marketing

### Role Overview

To drive suitable, sustainable and profitable AUM growth for Casterbridge by delivering outstanding investment solutions to Financial Planners. This role will be a key interface between the Investment Managers and adviser firms, taking ownership of new business development and relationship management initiatives.

### Responsibilities and Duties

To achieve this objective, your responsibilities will include (but not be limited to):

- Proactively source, develop, and convert new Financial Planner relationships to deliver sustainable AUM growth.
- Nurture existing Financial Planner relationships to strengthen engagement, increase retention, and uncover new opportunities.
- Collaborate closely with Investment Managers, Sales & Marketing colleagues, and the wider Casterbridge team to ensure seamless delivery of services and solutions.
- Take ownership of lead generation activities, both self-sourced and from internal initiatives, ensuring a robust and growing pipeline.
- Provide regular market insight and feedback from adviser interactions to inform product development, service enhancement, and marketing strategy.
- Lead the planning and execution of targeted sales campaigns and client-facing events, working alongside the Marketing Assistant and wider team.
- Contribute to the creation of marketing content through adviser-led insights and idea generation.
- Identify and pursue alternative business development opportunities to drive AUM growth.

## Person Specification

CRITERIA	ESSENTIAL	DESIRABLE
Qualifications	<p>A minimum of a full Level 3 qualification, preferably in Financial Services or a related subject area</p> <p>Strong academic background including English Language and Maths</p>	A Finance Services related qualification
Knowledge	<p>In-depth knowledge of the Financial Services profession, including the UK retail distribution market and MPS/DPS offerings</p> <p>Understanding of investments and investment products</p> <p>Proficient in Microsoft Office applications, in particular PowerPoint for presentations</p>	
Experience	Proven experience of working within Financial Services sales, with strong track record of closing business and generating AUM growth	At least 3-5 years' experience within a similar Financial Services business development role
Skills/Qualities	<p>Demonstrate strong relationship management skills, with the ability to build and maintain trusted adviser relationships</p> <p>Demonstrate strong time management and organizational skills, with the ability to meet deadlines in a fast-paced environment</p> <p>Self-starter with initiative and a proactive, problem-solving mindset</p> <p>Demonstrative excellent communication skills, both verbal and written, through a range of communication methods</p> <p>Collaborative team player, able to develop and sustain strong working relationships internally and externally</p>	Demonstrate an ability to work as part of a team and to develop and sustain good working relationships with internal and external clients/agents