

<b>Job Title:</b>	Senior Client Relationship Manager (CRM)	<b>Reporting to:</b>	CEO, Gresham House Ireland
<b>Salary / Benefits:</b>	Tbc	<b>Position type and location:</b>	Permanent. Dublin

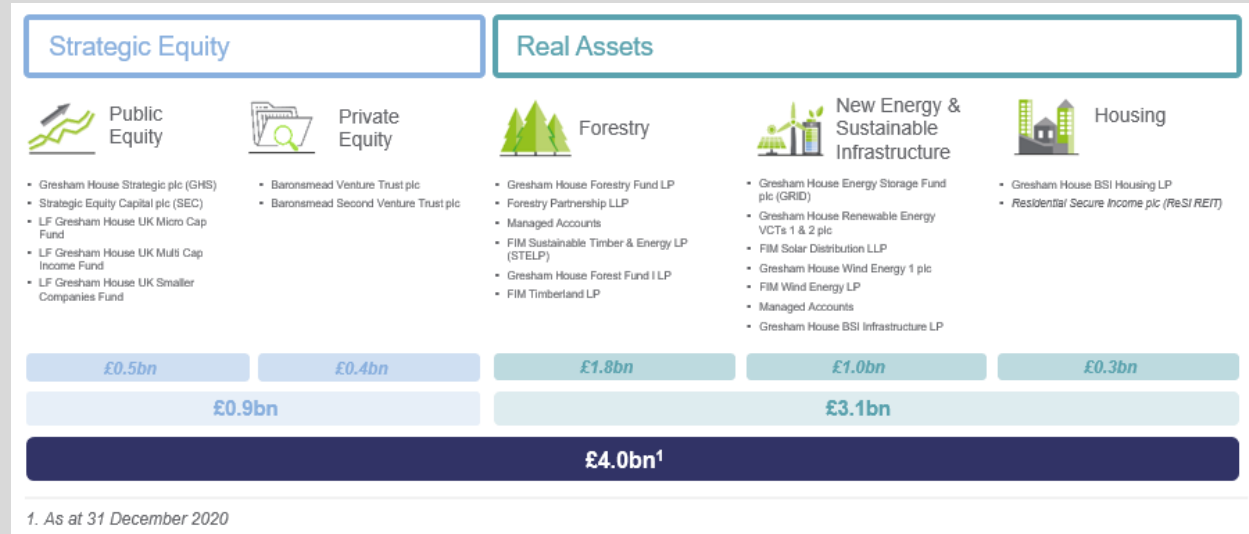
**Background:**

Gresham House is a specialist alternative asset manager dedicated to sustainable investments across a range of strategies, with expertise in forestry, housing, infrastructure, renewable energy and battery storage, public and private equity. We provide funds, direct investments and tailored investment solutions, including co-investment across a range of highly differentiated alternative investment strategies. We aim to deliver sustainable financial returns and we are committed to building long-term partnerships with our clients to help them achieve their financial goals.

As a signatory to the UN-supported Principle for Responsible Investment (PRI), our vision is to always make a positive social or environmental impact, while delivering on our commitments to shareholders, employees and investors.

From a standing start in December 2014, through a combination of acquisitions and organic growth, the Gresham House business has grown exponentially, with assets under management now at c.£4.0 billion, (31 December 2020), providing a strong and scalable platform from which to continue to grow. The team is delivering on its objectives and now has c.160+ employees working in London, Oxford, Dumfries, Perth and Dublin.

The business is set across two divisions – Strategic Equity and Real Assets:



Gresham House Ireland, formerly Appian Asset Management, is a leading Irish based asset manager that was founded in 2003. It manages a range of funds, on behalf of private clients, pension funds, endowments, charities and corporates in Ireland, focused on different areas of investment, from global funds to Irish property. Gresham House acquired Appian Asset Management in July 2021.

**Role and Objective:**

As a CRM, the role is working within the Client Relationship team of Gresham House Ireland (GHI). The CRM team are responsible for offering investment solutions to high net-worth clients, Corporates and the charity sector. The CRM should act as a trusted advisor to GHI’s clients, providing sound non independent financial advice (where required) with regards to investment in the six funds currently offered by GHI across a range of asset classes.

**Regulated Role:**

This role is deemed as a control function under the Central Bank of Ireland Regulations. Namely, Fitness and Probity Standards 2014 (Code issued under Section 50 of the Central Bank Reform Act 2010). This role holds two Control Function (CF) positions as per the standards:

CF 3	Giving of advice to a customer of the regulated financial service provider
CF 4	Arranging a financial service for a customer of the regulated financial service provider

It is necessary for the role holder to ensure that they are compliant with the requirements of the Central Bank’s Minimum Competency Regulations 2017. The designated management function: distribution is required under CBI’s Fund Management Guidance.

**Key Responsibilities / Accountabilities:**

Sales and Business Development:

- Through the relationship model, manage and maintain the current client base – management and growth of existing AUM.
- Business Development in all relevant customer areas: personal, corporate and charity sector i.e. creation and maintenance of new AUM.
- Identify, initiate, build and maintain effective introductory relationships with key stakeholders to ensure effective opportunity streams for new clients.
- Assist the CEO with the development of and implementation of the annual marketing plan.
- Delivery of high-quality financial advice to customers, maximizing value for our clients and negotiating the best commercial outcome for the client and the organization. At all times, treating clients fairly and equally.
- Ability to discuss the external financial and economic market (their issues and opportunities) with clients.

Risk Management:

Ensure that standards both legal and regulatory are adhered to, in order to avoid exposing the business undue risk. This will include but is not limited to, GHI’s policies and procedures with regards to:

- Customer sales process, suitability and risk profile
- Anti-money laundering onboarding requirements and ongoing customer due diligence
- Adherence to the suspicious transaction process
- Data Protection Act requirements
- Adherence to the requirements of the employee handbook

Internal Relationship Management:

- Develop and foster strong working relationships with other functions within GHI. This will ensure the customer receives the best experience and solutions from GHI.
- Joint responsibility with other CRMs and internal colleagues for the end to-end client experience, profitability and satisfaction.
- Involvement in firm wide projects where required.

**Skills & Experience:**

- Minimum 5 to 7 years in senior client relationship role within financial services – preferably funds, asset management and / or wealth management (private banking)
- Relevant professional qualification for example, CFA or CAIA
- Able to demonstrate a strong and successful direct business development track record.
- Experience in presenting to clients and delivery of RFPs
- Excellent working knowledge of the Irish and UK Investment Industry, markets and Investment management techniques
- Strong technical product and investment skills, enabling effective dialogue with consultants, analysts and clients.
- Working knowledge of the regulatory environment within which a company such as Gresham House Ireland operates.

**Personal Attributes:**

- Excellent interpersonal skills
- Strong communication skills both verbal and written.
- An entrepreneurial spirit combined with a collegiate approach.
- Self-motivated, be able to work on their own but very much a team player.
- A willingness to embrace challenge and work within an evolving / changing environment.
- Task oriented and organised to manage a number of competing priorities simultaneously.
- A constructive approach with the ability to relate to varying personalities.

*Gresham House Ireland is an equal opportunities employer and encourages all qualified candidates to apply regardless of their racial, ethnic, religious and cultural background, gender, sexual orientation or disabilities. Gresham House Ireland is dedicated to encouraging a supportive and inclusive culture amongst all our employees.*



**Gresham House**  
*Specialist asset management*