

# Job Description

<b>Job Title</b>	Project Manager – Private Equity
<b>Responsible to</b>	Head of Private Equity/Board Director
<b>Responsible for</b>	n/a
<b>Summary of Role</b>	<p><b>The key purpose of this role is to project manage the due diligence services provided to our Private Equity partners</b></p> <p><b>To help, support and manage “Portfolio” client businesses for our Private Equity Clients.</b></p> <p><b>To assist in winning new “Portfolio” accounts by helping to quote, negotiate and place transactional insurance as appropriate.</b></p> <p><b>To help build the Private Equity division and its reputation and provide a professional service and day to day support to our Private Equity Partners and colleagues.</b></p>
<b>Main Responsibilities and Duties</b>	
1	To contribute towards the financial targets set by the business.
2	To help colleagues by providing efficient and accurate information to ensure sales opportunities are realised
3	Produce and maintain accurate documents at all times
4	Provide Private Equity Partners and clients with excellent service
5	Establish and maintain trusted relationships with Private Equity Partners and clients and provide them with a professional consultancy service
6	Ensure all records are accurately set up and transferred onto the computer system and correct documents are issued to clients
7	Ensure accounts transactions are raised quickly and accurately and that client debts are chased promptly.
8	Maintain knowledge of current market conditions
9	Provide support and guidance to colleagues requiring your help, identifying training needs and assisting colleagues in arranging and advising on classes of business where you are more experienced.
10	Adhere to FCA Regulation at all times
11	Adhere to specific Company Policies and Procedures at all time
12	To undertake additional duties as may be assigned from time to time
13	Uphold Vista’s brand values inside and outside of the office

**Person Specification:**

- Experience of working in a Private Equity/Due Diligence team would be a distinct advantage
- Good technical knowledge
- Ideally qualified to DipCII or progressing towards ACII
- Good analytical skills
- Familiarity with Salesforce and Acturis desirable not essential

Highly competitive salary, bonus and benefits on offer.