Senior Business Development Coordinator Job Description

Team: Crestbridge Fiduciary, Jersey

Reporting to: Director, Client and Commercial Strategy

The Crestbridge difference

Crestbridge Fiduciary is a privately-owned and independent fiduciary services provider.

Our specialist team work alongside HNWI and UHNWI individuals and families, providing a comprehensive and sophisticated global platform for protecting and structuring wealth. We offer a truly multi- jurisdictional service accommodating even the most complex cross-border structures, supported from our offices in Jersey and Wyoming.

Driven by an uncompromising focus on service quality and holding ourselves to the highest standards of transparency and personal integrity, we cultivate relationships that endure across generations. We are committed to ensuring our clients enjoy the clarity and peace of mind to pursue life's passions.

Life at Crestbridge Fiduciary

Our shared company values are integrity, professionalism and agility. These are principles we strive to uphold not only in our dealings with clients, but in how we support one another.

We are committed to offering clear and engaging career paths, and an environment in which all colleagues feel empowered. Where possible, you will be afforded as much responsibility as you are comfortable with accepting, along with ample opportunity to realise your full potential through diverse and challenging work.

Alongside continuous training and development, invaluable mentorship and guidance are provided by our globally experienced executive team.

Along with a lively social calendar of events and activities, we strive to engage fully with, and contribute to, the communities in which we live and work.

The Role

You will provide administrative, analytical and coordination support to the Business Development Committee. In this non-client-facing role, you will assist with the planning, execution, and evaluation of business development activities, helping to drive and measure the effectiveness of initiatives across Crestbridge Fiduciary.

You will be responsible for coordinating, preparing, and delivering documentation for new business proposals, pitches, and intermediary presentations. The role involves business development analysis, producing management information and performance reports, to support decision-making and growth objectives. It also supports, and where appropriate, leads key business development initiatives, including the firm's key intermediary programme, helping to strengthen relationships and identify new business opportunities, and other strategic projects designed to enhance our business development activities and outcomes.

Key Result Areas

- Provide accurate, timely, and high-quality business development support in accordance with company standards, procedures, and guidelines.
- Support the delivery and ongoing management of key business development programmes, strategic initiatives, and internal projects.
- Own the preparation, analysis, and reporting of business development activity, pipeline performance, and progress across the business.
- Conduct market research, competitor analysis, and market mapping to identify opportunities and support strategic decision-making.
- Build and maintain effective working relationships with colleagues and stakeholders to support the achievement of business development objectives.
- Take ownership of your professional development by actively pursuing learning opportunities and delivering against agreed performance and development objectives.
- Act as a role model and ambassador for Crestbridge Fiduciary, always acting in accordance with our core values.

Key Responsibilities

The list below details the tasks that your role is likely to include. It is not exhaustive and may be amended from time to time:

Committee Administration and Governance

- Coordinate Business Development Committee meetings, including scheduling, agenda preparation, and distribution of meeting papers.
- Prepare accurate meeting minutes, action logs, and follow-up reports.
- Monitor completion of agreed actions and provide progress updates to the Committee.
- Support the ongoing review and enhancement of Business Development Committee governance, processes, and Terms of Reference.
- Liaise with the Marketing team to provide input and content for business development materials, communications, and events.

Business Development Support

- Oversee the tracking and management of new business opportunities, referrals, and prospective client engagements.
- Act as a key user of the CRM platform, ensuring data integrity, promoting best practice, and providing guidance and training to colleagues.
- Coordinate the collection of information required for proposals, tenders, presentations, and client pitches.
- Support the implementation and monitoring of business development strategies and initiatives.
- Coordinate intermediary and business development trips for directors, including scheduling, logistics, meeting planning, and preparation of supporting materials.
- Coordinate post-meeting and post-trip follow-up activities, ensuring actions, outcomes, and opportunities are accurately recorded and progressed.

- Coordinate, prepare, and deliver high-quality proposals, pitches, and new business documentation for prospective clients and intermediaries, including supporting pricing discussions with senior stakeholders.

Management Information and Reporting

- Prepare regular reports and dashboards on business development activity, pipeline performance, conversion rates, and revenue generation to support decision-making and performance tracking.
- Analyse trends, market developments, and business opportunities to support Committee discussions.
- Produce bespoke presentation documents for existing and prospective clients to cover topics relevant to our service offering.

Stakeholder Coordination

- Liaise with key stakeholders to coordinate and compile responses to Requests for Proposal (RFPs) and due diligence questionnaires.
- Support internal communication of business development priorities and outcomes.
- Coordinate cross-functional activities arising from Committee decisions.

Market and Competitor Intelligence

- Support the firm's key client and intermediary programmes by conducting research, coordinating meetings, recording actions, and tracking engagement and outcomes.
- Conduct desk research to support "go to market" team business development meetings and conference attendance.
- Support the maintenance of target client and intermediary databases.
- Conduct research and prepare briefing packs to support director meetings, business development activities, conferences, and market engagement initiatives.

Requirements

Qualifications

- A good academic background, educated to a minimum of A levels (or equivalent).
- Hold a relevant professional qualification.

Knowledge and Experience

- A minimum of 5 years' experience working in a professional services business.
- Good knowledge and understanding of current local finance industry legislation, regulatory requirements and working practices.
- Excellent systems knowledge to include working with CRM systems and experience of producing data-driven, analytical research, reporting and dashboards.
- A sound knowledge of Microsoft Office.

Skills and Qualities

- Ability to perform in a busy, transaction-driven environment, managing multiple and competing deadlines.
- Strong organisation and time management skills with excellent attention to detail.
- Excellent written and verbal communication skills in English.

- Ability to build effective working relationships with senior stakeholders.
- Strong project management skills.
- Proactive, flexible, and able to take ownership and work independently.
- Commercially aware with a strong appreciation of confidentiality.
- Driven, enthusiastic, and committed to delivering high-quality service.
- Willingness to support colleagues and contribute to wider business objectives beyond core responsibilities.

Additional Information

Our Core Values

Our team share and demonstrate the following behaviours which align to our values:

Integrity – kind, trustworthy and compassionate, working collaboratively and respectfully with colleagues, clients and other stakeholders.

Professionalism - reliable and accurate, working consistently to deliver solutions efficiently, effectively and with a level of technical expertise appropriate to your experience.

Agility - flexible and commercial, happy to adapt to changing demands and offer support wherever required to meet the needs of the business.

We offer all our permanent team members a great benefits package that includes*:

- Competitive salary
- Non-contributory pension scheme
- Private healthcare
- Life insurance
- Critical illness cover
- Option to buy or sell up to 5 extra days of annual leave
- 3 additional wellbeing days a year
- Discretionary annual bonus
- Support for professional qualifications and ongoing development

**Eligibility for certain benefits will commence after completion of probation. Crestbridge reserves the right to vary or withdraw benefits at any time.*