
JOB DESCRIPTION

Job Title: Business Development & Events Manager (Individuals)

Grade: D

Department: Business Development, HNWI Audience

Main purpose of job:

As a key member of the Business Development team, you will proactively support the growth of philanthropy services across CAF's HNWI Audience prioritising advisor, client and public relations engagement through the active development and ongoing management of events that collaborate across the private client, marketing, external affairs and client relations teams. This role will focus on identifying and progressing new opportunities for growth through active management of flagship events, membership packages and sponsorship opportunities, whilst working across teams to support events internally, driving new leads. The role will also cover pipeline tracking, attending key meetings and conferences and also support the development of an active Awards Submissions Programme and driving greater engagement for private clients across the Impact Accelerator. Underpinning all events planned as part of this role will be a considered approach to impact, with CAF's theory of change in mind.

Responsible to: Senior Business Development Manager (Individuals)

Budgetary responsibilities: None

Responsible for: None

Key Job Responsibilities:

- In conjunction with the Senior Business Development Manager, develop and manage the implementation of an ambitious events programme for CAF's Private Client, Marketing External Affairs & Client Relations teams for high-net-worth individuals, including our market leading UK Donor Advised Fund and our US/UK dual qualified product
- Achieve ambitious sales objectives and KPIs by driving new referrals through significantly increased introducer, client and public relations engagement activities
- Proactively secure new meetings, presentations and events for key SMEs for CAF's HNWI Audience to promote our philanthropy services
- Attend meetings, events and other activity to promote CAF's client services, with a focus on the private client community
- Work with CAF's Marketing team to leverage campaigns, e-news content collateral and research that generate leads and wider engagement, whilst increasing our understanding of our HNWI audience

General responsibilities

- Continuing education through seminars, conferences and related training to promote skills growth and development in sales, business development and prospecting
- Develop detailed knowledge of CAF's full range of services and the wider impact economy
- Deliver high quality customer service, both proactive and responsive, to ensure that partners, clients and internal stakeholders are always highly satisfied and engaged
- Be proactive in the suggestion and development of new work processes and procedures, assisting with the implementation of solutions where required to continually improve pipeline management
- Proactively participate in positive communication and collaborative initiatives between the various CAF teams across CAF group
- Participate in the performance management system by:
 - Achieving personal and team goals as agreed with Line Manager.
 - Giving and receiving feedback
 - Gathering evidence to support performance
 - Supporting less experienced team members with training and guidance as required

CAF Values and Behavioural Indicators

The CAF Values and Behavioural Indicators set out in a transparent and consistent manner the explanation of the performance expectations of all CAF People. Through the use of common language and common standard, it combines a set of behaviours with the required technical skills and knowledge needed to effectively perform in any given role in CAF. This is used for the assessment, management and development of performance of all our people across CAF

Please refer to the link: [CAF values and indicative behaviours](#) for the CAF Values and Behavioural Indicators.

Date: 17 December 2025

PERSON SPECIFICATION

Job title: Business Development & Events Manager

Date: 17/12/2025

Attributes	Essential ✓	Desirable ✓	How Evidenced ⁺
Experience Understanding of business development, sales, prospecting Experience of managing an organisational wide events programme Experience of delivering against contracted assets & leveraging opportunities Experience with B2B business development and sales Implementation of a business strategy Understanding of charitable or financial services sectors Line management of a direct report	✓ ✓ ✓ ✓ ✓	✓ ✓	
Qualifications None required.			
Training Sales training		✓	
Specialist Skills/ Ability/Knowledge Ability to build and maintain relationships Use of CRM for sales prospecting and logging Demonstrate ability to successfully negotiate and influence Knowledge of philanthropic and/or financial services products Computer literacy Excel	✓ ✓ ✓ ✓ ✓ ✓		
Communication Excellent verbal and written communications Positive communication and team work with internal teams and stakeholders Excellent, professional communication with external prospects and third party introducers	✓ ✓ ✓		
Personal Qualities Great attention to detail and organisation skills in order to track, log and analyse opportunities Positive, solution focused attitude Friendly, supportive approach to team work Self motivated and focused on completing tasks Good time management and organisation skills	✓ ✓ ✓ ✓ ✓		
Special Conditions Some evening hours required for attending and supporting events	✓		
Prior to Appointment All posts: <ul style="list-style-type: none"> Credit Check Sanctions Check Basic DBS Check Employment References 	✓ ✓ ✓ ✓		R/E

<ul style="list-style-type: none"> Medical Clearance Right to Work in the UK 	✓ ✓		
FCA Approved Posts: <ul style="list-style-type: none"> Standard DBS Check 	✓		

✓ Tick either the *Essential* or *Desirable* column as appropriate for each attribute

† Insert the code from the key below for how you intend to assess this requirement e.g. at interview, via references etc.

Key

R = References, E = Evidence/Certificates, A = Application, C = Competency Interview, T = Testing/Assessment