

## Portfolio Solutions Associate

### London (hybrid)

#### About BMS Group

BMS is a dynamic, independent, global broker established in 1980, delivering specialist insurance, reinsurance, and capital markets advisory services. We are a global brand with offices located across the US, Canada, Latin America, Australia, Europe and Asia with both a strong, local focus and understanding of market needs.

Our teams are respected globally for their specialist market knowledge, intelligent analysis and insight. Our people strive to be 'the best in class' and with an innovative approach and their entrepreneurial thinking, our clients truly benefit from better solutions to policy development and placement.

Being independent makes a key difference to our clients, giving our brokers the freedom to deliver the best solutions, tailored to meet their business needs. Coupled with our collaborative team approach, single platform worldwide and renowned personal service, we are the independent broker of choice.

#### Summary of Position

We are growing the Portfolio Solutions Team at BMS and are seeking independent thinkers who are willing to do the work and seize the opportunity at hand. The role in its initial phase will combine manual document extraction and data validation with contextual judgement: reading insurance contracts, pulling out the right fields, and in time, understanding whether the data sets produced meet specific criteria. The insurance component can be taught; the mindset cannot. A clear head, a methodical approach, and the ambition to eventually make our processes more efficient are the things that matter here. Beyond the initial phase, we want the chosen candidate to match us in growth meaning where they take their role and career with us will be driven in large part by where they seek to drive it.

Accuracy in this phase drives the quality of everything automated on top of it, and the people who understand the data by doing it are best placed to build the tools that replace it. We are targeting school and university graduates who want to get stuck in, grow fast, and contribute to shaping how the team works and subsequently BMS.

This role offers the opportunity to join a dynamic team that operates like a start up within an existing company. Already profitable, the team has experienced significant growth in the past year and it's only the beginning.

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BMS Group Ltd

## What we're looking for

### HARD SKILLS

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	Skill / Area	What We're Looking For
Must	<b>Excel — intermediate</b>	Formulas (VLOOKUP/INDEX-MATCH, SUMIF, IF), filtering, sorting, and basic formatting. The primary working environment day to day.
Must	<b>Data entry accuracy</b>	Methodical extraction of values from insurance slips and MRCs into structured spreadsheets. Precision is the job.
Must	<b>Document literacy</b>	Reading dense insurance documents to locate limits, premiums, attachment points, risk codes, and coverage conditions.
Must	<b>Cross-referencing &amp; validation</b>	Comparing extracted data against source documents and flagging discrepancies. The core of the validation workflow.
Nice	<b>Python basics</b>	Even light scripting — CSVs, simple loops — opens the door to automating extraction tasks as the role develops.
Nice	<b>Excel advanced</b>	Power Query, pivot tables, conditional formatting. Reduces manual effort and produces cleaner, reusable outputs.
Nice	<b>SQL basics</b>	Ability to run or tweak a basic query against internal databases is a useful accelerator.

## SOFT SKILLS

	Skill / Area	What We're Looking For
Must	<b>No-ego work ethic</b>	Genuine grunt work will be involved, primarily in the beginning: row-by-row validation, manual lookups, repetitive extraction. The right person does it well, not just quickly.
Must	<b>Attention to detail</b>	Accuracy is key to, for example, £1.2M vs £12M on a slip is the difference between a usable dataset and a corrupted one.
Must	<b>Intellectual curiosity</b>	Insurance concepts will be taught — but candidates who ask why things work the way they do develop faster. Better still are people with the intellectual confidence to question (where relevant) why things are done how they are & look to implement appropriate changes where fit.
Must	<b>Reliability &amp; ownership</b>	Hitting batch deadlines, flagging blockers early, not letting ambiguity become inaction. The team is small; dropped balls matter.
Must	<b>Clear communication</b>	Flagging when something looks wrong in a document — concisely, not silently proceeding on a guess.
Nice	<b>Process improvement mindset</b>	Noticing patterns over time — 'I do this 50 times a week, could we script it?' That instinct is what the role is designed to grow into.
Nice	<b>Comfort with ambiguity</b>	Insurance documents are inconsistent. Making a reasonable judgement call and flagging it — rather than freezing — is valuable.
Nice	<b>Collaborative disposition</b>	Sharing context, documenting what you learn, making it easy for others to pick up your work.
Nice	<b>Self-directed learning</b>	Looking things up, taking initiative on terminology and tooling, not waiting to be taught everything but also willing to always ask questions.

## What's in it for me?

This is a permanent role, offering a competitive salary and bonus, 27 days holiday, plus access to our personalised benefits platform, Your Rewards, including:

- comprehensive private medical cover for you and your dependents
- complimentary annual health checks
- access to a virtual 24hr GP
- gym subsidy & dedicated wellbeing support
- retail discounts
- opportunity to purchase equity
- defined contribution pension
- extra day's leave to celebrate your birthday

Through our Diversity, Equity and Inclusion (DEI) vision, we are committed to 'building a culture of belonging for all, valuing diverse perspectives and embracing authenticity.' As such, we have created our 'BMS Together' programme, with dedicated training, collaborative committees and intentional partnerships. In support of our ESG vision, we offer two additional paid days each year to take part in charitable work.

BMS offers flexible and hybrid working policies and we're happy to discuss options with you upon application. Please let our team know if you require any adjustments to support you through the application process.