

KTP Associate Role Profile

Job Title:	Business Intelligence Developer- Finance (KTP Associate, JT Financial Management)
Business Partner / University School	JT Financial Management Ltd and the University of Surrey's Sustainable and Explainable FinTech(SAEF) Centre (Surrey Business School) and the Computer Science Research Centre (School of Computer Science and Electronic Engineering)
Based at:	JTFM, Austen House, Spaces, Station View, Guildford, Surrey, GU1 4AR

Job Summary and Purpose:

The University of Surrey in collaboration with JT Financial Management, seeks a highly motivated recent postgraduate to lead a groundbreaking Knowledge Transfer Partnership (KTP) project in accordance with a pre-defined programme of works.

About KTP:

The KTP program isn't just a graduate recruitment scheme; it's a springboard to fast-track a career in industry. It empowers **RECENT** graduates and postgraduates (the Associate) to seamlessly transition from academia to a dynamic business environment. You'll tackle real-world challenges, drive innovation, and create positive impact from day one. The Associate benefits from business-based training, a dedicated professional development budget, and opportunity to develop crucial skills like leadership and project management.

A KTP Project is a powerful three-way collaboration between the Associate, a university (Knowledge Base) and a company (Business Partner). This partnership fosters knowledge sharing, innovation, and mutual learning. This KTP project is co-funded by Innovate UK and the Business Partner. The Associate will be employed by the University of Surrey but will be based at the Business Partner's location, working under the guidance of key company personnel and with ongoing support from university academics. The position is a fixed-term contract for 30-months with potential for recruitment by the business partner at the end of the KTP.

About JTFM:

JTFM is an FCA-regulated (Financial Conduct Authority) investment consultancy based in Guildford. They advise individuals, family offices, charities, and endowments, empowering them to make informed investment decisions. JTFM's services include conducting portfolio reviews, setting investment policy, searching for investment managers, and providing ongoing monitoring and

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reporting. JTFM's trademarked Jellyfish® currently plays a pivotal role in generating the reports JTFM provides as part of its ongoing monitoring and reporting service.

Main Responsibilities/Activities

This project aims to create to develop an innovative AI-powered FinTech toolkit that automates chart generation, enabling rapid client presentation and reducing manual effort. It will transform the business into a consultancy that is data-driven, which will propel business growth and financial inclusion.

In doing so, the JTFM will be able to:

- i) swiftly process and analyse large volumes of data, enabling it to rapidly make informed decisions.
- ii) establish a robust framework for continuous software development and maintenance, ensuring its effectiveness and adaptability to evolving needs.

The Associate will be responsible for developing an innovative AI-powered FinTech toolkit that automates chart generation, enabling rapid client presentation and reducing manual effort. It will transform the business into a consultancy that is data-driven, which will propel business growth and financial inclusion. As the project manager, the Associate will have ownership of the project while collaborating with both the university and the business partner whose experienced teams will provide comprehensive support. The Associate will play a crucial role in fostering knowledge exchange and integration between the business partner and the University of Surrey.

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Person Specification

The post holder profile:

- A minimum postgraduate degree in Investment Management, Fintech and Policy, Business/Data Analytics, Finance, Computer/Data Science, or related field with a strong quantitative foundation.
- Proven experience in Data Analysis and AI tools and programming: Proficiency in one or more of Python, R, Rust, SQL with the ability to learn others quickly.
- Data Visualisation skills: Creating impactful visualisations and graphical user interfaces.
- Project management/Business Acumen: Ability to lead a strategic project, mapping business and information processes, presenting insights in clear reports, and translating technical jargon for non-technical audiences.
- Excellent communication skills to effectively engage with diverse stakeholders from various backgrounds, including technical, business, policy, scientific fields.
- High competency written and spoken English at a technical level (e.g. IELTS 7.0 or a degree qualification from a majority English-speaking country)

Relationships and Contacts

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This is not an exhaustive list of every relationship the post holder has but is a brief description of those that play an important part in the post holder successfully carrying out the role.

As an integral member of the University of Surrey's KTP team, the Associate will collaborate closely with both university academics and the business partner Supervisor. This will involve building a project team and maintaining regular communication with the University's KTP Office. Weekly meetings (both online and on-site at the Business Partner's location) will ensure ongoing engagement with the academic team.

The role offers valuable networking opportunities with other KTP Associates. Additionally, the Associate will have the chance to interact closely with professionals from the business partner and their clients who may provide valuable feedback on the project's direction and progress.

Internal Relationships

- KTP Office
- Business Partner KTP delivery team
- Academic KTP delivery team
- Other University of Surrey Staff and Students
- Other Company Staff
- Project Steering Committee

External Relationships

- Innovate UK Business Connect - KT Adviser.
- Other KTP Associates.
- Business Partner's Clients.

Special Requirements

Based at the Business Partner site, the KTP Associate:

- must be prepared to work outside normal working hours, when required.
- must be willing to undertake further studies, as approximately **10%** of their working hours should be **dedicated to training and development**.
- will be required to travel to the University of Surrey, and occasionally more widely.

As a university employee, all KTP Associates are expected to:

- Undertake such other duties within the scope of the KTP as may be requested by their Supervisors or Line Manager.
- Positively support equality of opportunity and equity of treatment to colleagues and students in accordance with the University of Surrey Equal Opportunities policy.
- Follow the Business Partner's policies and working practices at all times to ensure that no disclosure of confidential information results from their actions.
- Follow University/School/Department policies and working practices at all times to ensure that no disclosure of confidential information results from their actions.
- Ensure they are aware of and abide by all relevant University / Business Partner / KTP regulations and policies relevant to their role.
- Help maintain a safe working environment by:

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- Attending training in Health and Safety requirements as necessary, both on appointment and as changes in duties and techniques demand
- Following local codes of safe working practices and the University of Surrey Health and Safety Policy
- Be a team-player, supportive of colleagues and always operating in a collegiate manner.

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Addendum

This document provides additional information relating to both specific aspects of the post/faculty and any post specific person specification criteria. The information contained within this document should always be read in conjunction with the accompanying generic Role Profile.

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Background Information

The working hours, annual leave, and holiday entitlement are those of the Business Partner.

The standard working hours of JT Financial Management Ltd are 40 hours per week including 60 minutes taken as a lunch break. The standard hours are 09:00-17:00.

The annual leave entitlement is 23 days per annum increasing by 1 day after each years' service up to a maximum of 25, plus UK public holidays. Informally staff have been given 2 days over the Christmas period whilst JTFM have closed the office. This is not a contractual entitlement. The holiday year runs from 1st January to 31st December.

Limited Gym passes available (company).

Potential to secure a permanent job with the business at the end of the KTP.

Please also see <https://jtfm.co.uk/> and <https://www.ktp-uk.org/>

Benefits to expect from the University of Surrey include a generous pension, discounted membership to Surrey Sports Park, cycle-to-work scheme, season ticket loans. Access to a wide range of courses under the Learning & Development Programme; library access

Benefits to expect from the KTP Programme include opportunity to gain professional qualifications or a higher degree. Access to academic support and the University's facilities to help deliver the KTP project.

Person Specification

This section describes the sum total of knowledge, experience & competence required by the post holder that is necessary for standard acceptable performance in carrying out this role. This is in addition to the criteria contained within the accompanying generic Role Profile.

	Essential/ Desirable
A minimum postgraduate degree in Investment Management, Fintech and Policy, Business/Data Analytics, Finance, Computer/Data Science, or related field with a strong quantitative foundation.	E
Experience in Data Analysis and AI tools i.e. Python, R, Power BI, SQL, and advanced Excel, in a programming environment.	E
Experience in data visualisation including Graphical User Interfaces.	E
Experience in data-driven research.	E

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A high level of competence in spoken/written English at a technical level (i.e. IELTS 7.0 or a degree qualification studied in a majority native English-speaking country)	E
Ability to focus on the strategic issues without getting lost in the detail; translate technical requirements into layman's language.	E
Ability to drive and manage a KTP, balancing technical and strategic elements	E
Strong attention to detail leading to a structured, logical approach to experimental design; accurate record keeping and professional reporting.	E
An interest in the Finance Services and financial technology would help with fitting into the business/project.	D
Enthusiasm for the scientific process, embracing new ideas whilst bridging the gap between academia/industry preserving the interests of both.	D
Strong interpersonal skills: ability to communicate and work with people at all levels.	D
Special Requirements	Essential/ Desirable
A clear understanding of the Business Partner where you will be based; and of the KTP program - how KTP works with business and the University, and the vital role the KTP Associate will play.	E
Ability to absorb knowledge and further develop skills during the KTP to complement those skills already in place.	E
Key Responsibilities	
This document is not designed to be a list of all tasks undertaken but an outline record of any faculty/post specific responsibilities (5 to 8 maximum). This should be read in conjunction with those contained within the accompanying generic Role Profile.	
<ol style="list-style-type: none"> 1. Lead and deliver an innovative project, bringing the University academics and the Business Partner together. 2. Developing an understanding of cutting-edge ML pipelines and their implementations 3. Developing an understanding of adopting ML-based solutions in real-world environment 4. Design and implement the data modelling and aggregation engine. 5. Developing and implementing trustworthy ML solution for financial data analysis. 6. Developing an understanding of database development - including system security, maintenance, and governance plans. 7. Present data in the form of visualisations that relate to the needs and priorities of customers. 8. Embed new knowledge in both the Business Partner and the University. 	
N.B. The above list is not exhaustive.	