

# Role Profile: **Associate, Secondaries**

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| <b>Functional Title:</b> Associate, Secondaries | <b>Rank:</b> Associate             |
| <b>Department:</b> Private Equity - Secondaries | <b>Reporting to:</b> Director      |
| <b>Office:</b> New York                         | <b>Appointment Type:</b> Permanent |

## About Capital Dynamics:

Capital Dynamics is an independent global asset management firm focusing on private assets, including private equity (primaries, secondaries co-investments), private credit, and clean energy. Created in 1988, the Firm has extensive knowledge and experience raising closed-ended funds and developing solutions tailored to meet the exacting needs of a diverse and global client base of institutional and private wealth investors.

As of Q1 2022, Capital Dynamics oversees more than USD 13 billion in assets under management and advisement, and employs approximately 160 professionals globally across 14 offices in Europe, the Middle East, North America, and Asia. Capital Dynamics is a recognized industry leader in responsible investing, receiving the highest marks from the UNPRI for its Strategy & Corporate Governance, and investment strategies. For more information, please visit: [www.capdyn.com](http://www.capdyn.com)

## Department Overview:

### Private Equity – Secondaries:

Global secondaries acquires limited partnership interest in established, high quality, mature leveraged buyout, growth capital and certain established venture capital funds and managers. The team’s differentiated approach focuses on smaller and more complex secondary transactions on a global basis, including fund restructuring, tail-end wind-down transactions, and preferred interest structures.

The deal sourcing and due diligence advantages that come with an established PE platform make the secondaries team a valuable partner.

## Role Purpose:

The Associate will play a key role supporting the Secondaries platform in focusing on quantitative and qualitative due diligence support for secondary investments. The Associate will be responsible for investment analysis, research, transaction structuring and deal execution support.

## Tasks and Responsibilities:

To succeed in this role, you will:

- Conduct quantitative modelling and qualitative due diligence on prospective investments and managers, and various ad hoc analyses and track record analysis.

- Conduct the quantitative and qualitative analysis of the opportunities, supporting drafting of investment memoranda, and support the execution.
- Write investment recommendations for presentation to investment committees.
- Lead the development of financial models.
- Various tasks related to investment monitoring, reporting.
- Support for various marketing and fundraising efforts.
- Support the origination of investment opportunities, develop own network.

**This description is for guidance purposes only. You may be required to fulfil additional roles and perform additional duties as required by the Company from time to time.**

### Skills, Education & Qualifications:

To succeed in this role, you should have:

#### Skills:

- Highly developed quantitative skills (financial analysis, modelling, valuation, and reporting).
- Exceptional attention to detail, with the ability to produce a high quality work product.
- Project management and presentation skills.
- Demonstrating propensity for a sound investment judgment with a keen awareness of risk, return and exposure management.
- Ability to complete tasks quickly and efficiently, having regard to changing priorities, differing time zones, and geographies.

#### Experience and Qualifications:

- A bachelors' degree in finance, mathematics or engineering, CFA preferred.
- Two to four years' relevant experience in private equity, investment banking or a closely-related field.
- Strong quantitative experience with solid skills in financial analysis, modelling, valuation, reporting, and writing.
- Experience working on simultaneous projects in a collaborative and demanding environment.
- Advanced Microsoft Office skills: Word, PowerPoint, Outlook and Excel.

#### Language Skills:

- Essential - Must be fluent in English and display superior writing skills.
- Desirable - Proficiency in another language; preferably German, Italian, Chinese/Mandarin, Japanese preferred though not essential.

### Competencies:

You will be:

- Highly developed verbal/written communication skills (articulate, balanced and persuasive).
- Agile communicator, commercially minded.
- Intellectually curious, proactive and self-motivated.
- Highly developed analytical skills and able to work on own initiative.

- Ability to work within a continuously evolving business environment.
- An ability to work accurately and in pressure situations.
- Good organizational skills and exceptional attention to detail.
- Ability to produce high quality presentational materials.
- A team player with a real ability to multi-task.

### **Diversity and Inclusion:**

Capital Dynamics is an Equal Opportunity Employer, and is committed to creating a global diverse workforce. We are a global company with 24 nationalities represented across our staff in 14 offices, spanning North America, Europe, the Middle East and Asia. We believe diversity and inclusion (“D&I”) is key to being better at what we do and our initiatives are designed to attract, develop, and advance talented individuals, regardless of race, sexual orientation, religion, age, gender, disability status or any other dimension of diversity. We welcome and strongly encourage suitably qualified applicants from a wide range of backgrounds to apply to join Capital Dynamics.