

Role Profile: **Analyst, RFP Specialist** **(Private Equity and Private Credit)**

Functional Title: Analyst, RFP Specialist (Private Equity and Private Credit)	Rank: Analyst
Department: Product Development and Strategy	Reporting to: Associate, Product Specialist
Location: Miami	Employment Type: Permanent
About Capital Dynamics:	
<p>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.</p> <p>As of Q1 2022, Capital Dynamics oversees more than USD 13 billion in assets under management and advisement, and employs approximately 150 professionals globally across 14 offices in Europe, North America, Asia, and the Middle East. 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</p>	
Department Overview:	
<p>Product Development & Strategy:</p> <p>Capital Dynamics’ Product Development and Strategy (“PDS”) team is responsible for the launch of every product on the CD platform across a diverse set of alternative investment strategies and local markets. The team also has ownership of a number of critical strategic initiatives across the Firm including identifying opportunities to expand our investment strategies, launch into new markets, and orchestrate the Firm’s ESG program and practices. It is a diverse and global group of talented and highly motivated individuals, which sits at the intersection of investment, sales, legal, compliance, structuring and responsible investment functions. Excelling in this role requires strong critical thinking, the ability to construct an argument and communicate effectively (both verbally and in writing), as well as strong quantitative fundamentals and understanding of the private markets.</p>	
Role Purpose:	
<p>The Analyst, RFP Specialist will join our PDS team in the Miami, Florida office and reporting to the Senior Associate, Product Specialist. The Analyst, RFP Specialist will play a crucial role engaging in investor communications by managing the end-to-end process of Request for Proposals (RFPs), Requests for Information (RFIs), Due Diligence Questionnaires (DDQs) and other written client materials.</p>	

The successful candidate will collect, craft and summarize quantitative and qualitative information about each of Capital Dynamics' Private Equity and Private Credit strategies, including performance and investment philosophy, while simultaneously understanding the respective market factors at play for reporting to our client base and driving the growth of our strategies.

In addition, the RFP Specialist will be responsible for keeping RFPIO, our RFP database, up to date with the latest responses, Firm and performance data, and related information. The role will also require maintaining and refining a quarterly review process across the departments in our organization.

The role requires financial / technical writing skills and strong attention to detail. Ability to produce substantive, internally consistent documents tailored to the audience and with minimal errors is crucial. The individual will be process-driven and can effectively project manage the delivery of RFPs on time with review time built in for key members of the Firm, including Investment Management, Sales, and Operations teams. The individual must take ownership of their responsibilities, ensuring that deliverables are met within given timelines. It is critical for the individual to have interpersonal skills and the ability to develop strong, effective working relationships with key stakeholders, including Product Specialists, Solutions (research), Sales (distribution), Legal, Compliance, Investment Management, and senior leadership within the Firm.

The role offers a unique opportunity to develop a deep understanding of Capital Dynamics' Private Equity and Credit platforms, as well as an in-depth knowledge of the broad spectrum of functions conducted within a global asset management firm. The individual will gain immediate exposure to the global Capital Dynamics network and benefit from the brand and professionalism of this new environment. In turn, you will use your experience and talent to support professional investors and financial executives on a daily basis.

Tasks and Responsibilities:

To succeed in this role, you will:

- Have a strong understanding of basic financial concepts and technical writing, with experience using Excel to effectively synthesize and present financial data.
- Complete RFPs, DDQs, surveys and other opportunity-related requests from our global client and prospect base for the company's Private Equity and Private Credit offering.
- Act as the first point of contact for the PDS team as well as the Sales team for the completion of RFPs.
- Act as a key liaison for the various internal departments providing the data for the completion of RFPs.
- Act as the coordinator with the company's internal departments for the completion of opportunity-related requests in a timely manner.
- Maintain and proactively update RFPIO and corporate data, including but not limited to Human Resources and similar data and company statistics.
- Ensure that all the materials are produced in accordance with the Firm's highest quality standards.
- Have outstanding attention to detail, organization and prioritization/resource allocation skills.
- Assist in streamlining the RFP evaluation and completion process in coordination with the PDS team.
- Have financial markets awareness or basic understanding of financial concepts.

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

Skills, Education & Qualifications:

To succeed in this role, you will illustrate :

Skills and experience:

- 1 to 5 years of experience in a similar private markets or alternative investments sector and/or RFP, marketing, client service, strategy or investor relations role.
- Mature, creative thinking and solutions-oriented.
- Track record of writing sophisticated professional presentations, presenting high impact messages in a clear, aesthetic format (using original ideas where necessary).
- High level of technical financial knowledge and analytical ability.
- Strong interest in Private Assets, with a particular interest in Private Equity and Private Credit.
- Strong project management skills and a process oriented approach to work.
- Ability to write content as well as edit material with a very high degree of precision.
- Exceptional attention to detail and ability to proof own work and work of others.
- Willingness to work across time zones and in a performance-driven, sometimes high-pressure environment.
- Very high-energy level with the ability to be both a self-starter and a team player.
- Highly developed interpersonal and customer service skills.
- Exceptional proficiency Microsoft Word, PowerPoint and Excel.

Education & Qualifications

- Minimum undergraduate degree from a recognized college / university.
- Preference for masters in English, Law, Marketing, Finance, Business Administration, Accounting, Economics or related field.

Languages

- Must be fluent in English and display superior writing skills.
- Proficiency in another European language; preferably, German, French, Italian, is highly desirable though not essential.

Competencies:

You will be...

- Analytical, quantitative and detail-oriented.
- Team player with an entrepreneurial spirit and approach.
- Highly organized and efficient with strong time management skills, and keep calm in moments of stress.
- Perceptive and see correlations.
- Confident and able to form relationships and work directly with stakeholders at all levels.
- Highly developed verbal/written communication skills.

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- Able to structure and present complex ideas and information in a simple persuasive form, both written and verbal.

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.