# Analyst or Senior Analyst, Client Relations Birmingham

**About Capital Dynamics:**

Capital Dynamics is an independent global asset management firm focusing on private assets, including clean energy, private equity (primaries, secondaries and co-investments) and private credit.

Established in 1988, the Firm has extensive knowledge and experience developing solutions tailored to meet the exacting needs of a diverse and global client base of institutional and private wealth investors. Capital Dynamics oversees more than USD 14 billion in assets under management and advisement and employs approximately 150 professionals globally across 12 offices in Europe, North America, and Asia.

Capital Dynamics is a recognized industry leader in responsible investment, receiving top marks (Five Stars) from PRI across all categories and investment strategies, as well as achieving strong results in GRESB benchmarking for its clean energy strategy.

**Department Overview:**

**Client Relations:**

The main role Client Relations plays within the organization is in its support of the firm's 1,500+ global investors. Client Relations acts as the one consistent contact for investors throughout the relationship and as a result, represents Capital Dynamics as a whole. The team's objective is to engage and strengthen the relationships with our investors, consultants, and advisors. Client Relations is one of the few externally facing teams and given our outreach, works cross functionally across the entire organization.

**Role Purpose:**

Capital Dynamics is seeking an **Analyst** or **Senior Analyst** to join the Client Relations team to support, co-ordinate and assist the Team Manager, Client Relations with the day-to-day management of existing investor client relationships as well as the investor activities for Capital Dynamics globally.

The Analyst / Senior Analyst will work closely with investment, marketing and communication, product development and strategy teams across the firm to execute top-quality client management and support business development efforts. The Analyst OR Senior Analyst will sit in a strategic position where you will be responsible for first class client servicing and investor's relationship management.

The role holder will be working closely with colleagues and clients in the US, as a result there is the requirement that the Analyst or Senior Analyst can commit to flexible working hours to accommodate US time zone coverage.

**Key responsibilities:**

- Act as the initial contact for inquiries received by phone, e-mail and mail from investors and their representatives
- Research and prepare responses to day-to-day inquiries (relating primarily to contact changes, capital call and distribution notices, fund reports, and audit confirms)

- Ensure investor reports and deliverables are issued on time
- Maintain the firm's investor database. Enter updates, proactively research discrepancies, build out reporting tools
- Manage interaction with our fund administrators, including the use of their proprietary systems
- Assist in the implementation of joint CR initiatives with Sales, Legal and Compliance, Fund Operations, Marketing and Communication
- Assist with various seasonal, annual, and semi-annual projects (FATCA / CRS / CDOT tax compliance, KYC and AML checks, transfers, annual meeting planning, and webcasts).
- Close coordination required with Legal / Compliance / IM /Marketing & Communications teams and third-party service providers
- Assist with document production and logistics for client update meetings, fundraising roadshows for existing clients.

***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.***

Background and experience:

- 2 to 4 years' relevant experience in client services, investor relations, finance or legal / compliance operations
- Experienced working at a private equity, fund administrator, family office or wealth management firm, and in an external facing capacity
- General knowledge of private equity general operations and terminology
- Strong knowledge of anti-money laundering and control procedures, GDPR requirements, partnership subscription and transfer agreements
- Highly developed interpersonal, customer service and verbal / written communication skills, must be comfortable speaking with investors at all levels

Education and Qualifications:

To succeed in this role, you should have:

*Essential:*

- A bachelor's degree, preferably in Economics, Finance, Communications, or Marketing, etc.
- Highly developed Microsoft skills, particularly in Excel (tables, reports, queries).
- Working knowledge of Microsoft Dynamics, Salesforce or other CRM tool, investor reporting portals.

Language skills:

- Written and spoken fluency in German would be highly beneficial to the role.

Competencies

We are looking for the following personal attributes:

- Exceptional attention to detail and ability to proof own work and the work of others
- Strong organizational and multi-tasking skills, process oriented yet creative and open-minded
- Ability to work in a small satellite office, in a small global team environment, and with minimal supervision
- Ability to work effectively with people at all levels of the organization

<u>Diversity & Inclusion:</u>

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 12 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.