To apply, please email your resume and any additional information to careers@capdyn.com

Role: **Senior Associate, Client Relations (US Client Support - Private Equity)**

Location: **Birmingham**

Contract Type: **Permanent (Full-time)**

Working hours: **12:00pm to 9:00pm (UK time)**

About Capital Dynamics:

Capital Dynamics is an independent global asset management firm focusing on private assets, including Private equity (primaries, secondaries and direct investments) and Clean Energy.

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 15 billion in assets under management and advisement and employs approximately 150 professionals globally across 13 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.

Role Purpose:

We are seeking an experienced Client Relations professional to provide support to the Capital Dynamics U.S. investor base.

The Senior Associate, Client Relations plays a pivotal role in enhancing the investor / client experience by delivering exceptional services and communication. With a proactive approach and strong collaboration across teams, you will contribute to building lasting client trust and drive the firm's continued success.

The successful candidate will have a strong background in client servicing / relationship management, particularly within private equity or alternative investments, and a deep expertise in AML and KYC processes, to ensure a seamless investor experience.

Key Tasks and Responsibilities:

- Act as the primary point of contact for U.S. based investors during the closing and post-close processes, handling inquiries and requests in a professional and timely manner.
- Manage post-fundraising communication and reporting to clients and the Sales teams in a timely and organized manner.
- Manage inbound and outbound investor communications via email and phone during all U.S. business hours (across US eastern and pacific time zones).

- Oversee and facilitate the global AML / KYC client-onboarding and on-going review processes, ensuring compliance while providing client-friendly experience.
- Guide investors globally through the AML / KYC onboarding process, and work closely with Legal, Compliance and fund administrator teams to ensure compliance with fund jurisdiction requirements while providing positive client experience.
- Track and manage periodic KYC refreshes, ensuring investors remain compliant with regulatory obligations while ensuring a seamless experience for investors.
- Build and maintain strong relationships with clients, demonstrating excellent communication and interpersonal skills.
- Provide clients with updates on fund performance, regulatory developments, and other relevant information to strengthen trust and engagement.
- Maintain accurate records of client interactions and communications in internal systems.
- Managing the client portal to ensure timely updates and accurate information, facilitating a seamless client experience.
- Collaborate closely with fund administrators, tax preparers and auditors to manage required deliverables and address client queries related to their areas.

Key Competencies:

- Exceptional relationship management experience with a client first approach.
- Good all-round understanding of private markets / alternatives investment / financial services operations developed working in a fast-paced environment.
- Experience managing or supporting AML and KYC procedures for clients in a global setting.
- Previous experience supporting regular client reporting, including investor reports.
- Experience coordinating with Legal / Compliance / IM /Marketing & Communications teams and third-party service providers.

Skills and Qualifications:

- Extensive experience in client relations within private equity or alternative asset management.
- Strong expertise in AML/ KYC requirements.
- Exceptional education qualification, preferred disciplines include Legal, Finance, economics or business degree.
- Master's degree/MBA preferred or additional credentials including CFA, CAIA, MBA or CPA is a bonus.

Diversity & Inclusion:

Capital Dynamics is an Equal Opportunity Employer and is committed to creating a global diverse workforce. We are a global company with 23 nationalities represented across our staff in 13 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.

Please inform our recruitment team if you have a disability, condition or difference that may require us to make any adjustments as part of your application process or during employment.