



Position Description

Investor Experience Manager

Reports to: Chief Strategy Officer
Position type: Permanent Full-time or Permanent Part-time 0.6 FTE
Location: Melbourne, Sydney, or Hong Kong
People Management: Not applicable

Position Purpose

The Investor Experience Manager will be responsible for creating a world-class investor journey from identification and solicitation through to onboarding, stewardship, re-investment and redemption. It is a hands-on, varied multi-tasking role working with the executive, investment, operations, and strategy teams to support investor relationship, stewardship and experience.

Main Tasks & Responsibilities

- Research and identify qualified prospects, with a focus on single- and multi-family offices, UHNW individuals, wholesale wealth managers and small to medium-sized institutions
- Support and attend solicitation meetings and provide follow-up through to closing
- Prepare and circulate monthly investor update reports for three funds
- Design and implement a stewardship program for existing investors including face-to-face events, webinars, and written updates
- Design and implement an investor education program for new investors, prospects, and the investment community at large
- Respond to ad hoc requests for information from existing and prospective investors

The Investor Experience Manager will work alongside the Operations team to facilitate:

- KYC/AML and onboarding processes
- The review and distribution of monthly NAV statements
- Dividend re-investments, distributions, and redemptions

Skills, Knowledge & Experience

- Experience working in an Investor Relations, Investor Services, or Investor Experience role in the investment management sector or a similar 'moves management' environment
- Highest integrity, ethics, and a commitment to a positive and inclusive culture.
- The ability to work independently, with at times minimal supervision/support.
- An egalitarian spirit, willing to do what's needed to thrive in a rapidly growing business.
- Well-developed written and verbal communication skills, including preparation and delivery of presentations, proposals, and reports
- Attention to detail and quality
- Skilled proficiency in using relevant software, particularly MS Word, PowerPoint, Excel, meeting platforms and CRM systems

Qualifications

- Relevant tertiary education and qualifications across commerce, economics, finance, business, or a related field

Please note: This job description serves to illustrate the scope and responsibilities of the role and is not intended to be an exhaustive list of duties and responsibilities.

Carbon Growth Group are an Equal Opportunity Employer who provide and promote an inclusive work environment. We embrace the diverse talent of people and treat each other fairly and with dignity regardless of race, gender, nationality, ethnic origin, religion, age, sexual orientation, or beliefs.

Acknowledgement

I certify that I have read, understood, and accept the duties, responsibilities, and obligations of my position.

SIGNED BY

Employee Date