Analyst OR Senior Analyst, Sales Support

Functional Title: Analyst OR Senior Analyst, Sales Support
Department: Business Development, Sales
Location: New York
Rank: Analyst
Reporting to: Associate
Employment Type: Full Time

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.

Role Purpose:

Capital Dynamics are seeking a junior-level, self-starting professional to join our US Business Development ("BD") team.

The Analyst OR Senior Analyst will assist with a range of activities to support the fundraising / marketing of CD's products to institutional Limited Partners ("LPs"), consultants and third-party wealth management intermediaries.

The ideal candidate is an organized, resourceful individual with private asset, Business Development (and / or Investor Relations) experience that can support various members of the US sales team with their fundraising and relationship building activities.

This role will work closely with team members across our BD, Product Development & Strategy ("PDS"), Marketing & Communications ("MarComms"), Legal and Compliance, and Investment Management ("IM") teams.

Tasks and Responsibilities:

The successful candidate we will possess strong project management capabilities, and organization skills to support senior sales individuals with *all* activities related to fundraising and relationship management.

Some examples include (but are not limited to):

- Assist with in-bound LP and Consultant requests across all strategies in a timely manner (in conjunction with PDS).
- Liaise with the PDS team to complete RFPs / RFIs.
- Project manage all virtual / on-site investment and / or operational due diligence sessions, alongside BD, PDS and IM (includes, but is not limited to, agendas, presentations, prep calls, calendar coordination, etc.).
- Assist with the US fund closing process (i.e., managing subscription documents and liaising with Legal, Tax and Compliance).
- Monitor databases (including Preqin, S&P MMD, etc.) and populate / manage CRM (Microsoft Dynamics 365) on ongoing / as needed basis.
- Monitor databases to identify investment searches; responsible for developing and maintaining tracking sheet outlining status of all ongoing RFP searches.
- Partner with and support senior sales representatives on fundraising efforts across the entire investment platform (including calendar coordination, prospecting research, conference marketing support, meeting prep notes, post call notes, etc.).
- Work with external sales support representatives to ensure meetings are within Compliance protocol (i.e., adhering to guidelines for all marketing to public pension funds).
- Manage tracking sheet for all third-party marketing (past and upcoming meetings).
- Review forward looking US BD calendar and assist with meeting and conference / event preparation.
- Prepare marketing materials (e.g., presentations, finals presentations, ad-hoc requests), alongside the PDS team.
- Assist with weekly updates / clean-up in CRM database to ensure information is accurate for upcoming week.

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

Skills, Education & Qualifications:

Skills and experience:

- 2 plus years of experience at an asset management or institutional investment consulting firm, with a focus on private assets preferred.
- Strong project / process management skills and the ability work well with others and operate in an entrepreneurial environment.
- Exceptional attention to detail and ability to proof own work and work of others.
- Exceptional Microsoft Office skills (Excel, PowerPoint, and Word).
- Ability to work under tight timeframes and manage strict deadlines.

Education and Qualifications:

- Undergraduate degree with strong academic background.
- SIE, Series 7 & 63 licenses helpful, although not required; candidate should be prepared to get securities licenses upon joining Capital Dynamics.
- Exceptional proficiency MS Word, MS Power Point and MS Excel.

Language:

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

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 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.