

distribution and product development: private clients

johannesburg



westbrooke
Alternative
Asset
Management

who we are

Founded in 2004, and with offices in South Africa, the UK and the USA, Westbrooke invests and manages capital in multiple geographies on behalf of its shareholders and investors in Private Debt, Hybrid Capital, Real Estate, Private Equity and Venture Capital. We manage in excess of R8bn of shareholder and investor capital invested predominantly in the UK, SA and the USA.

Westbrooke Alternative Asset Management was established as a multi-asset, multi-strategy manager of alternative investment funds and products structured to preserve and compound our clients' wealth to cement their future prosperity.

Westbrooke is a dynamic business which operates in one of the world's fastest growing and most relevant investment classes. Our culture is one in which young, ambitious, entrepreneurial, top achievers thrive in an environment where accountability and total ownership of tasks is a pre-requisite. We do not subscribe to the philosophy of micro-management – rather, employees are expected to be sufficiently driven and ambitious to manage themselves and to formulate their own methods of achieving the outcomes set for them within their annual business plans.

overview of the role

You will join Westbrooke as a key team member in Westbrooke's Distribution and Product Development pillar, with a focus on our high-net-worth, ultra-high-net-worth and family office clients. The role requires you to be involved in every element of the transaction / fund lifecycle: from involvement in investment committees so as to structure transactions in the most attractive way for clients, to playing a key role in the deal "go / no-go" and structuring decision, to holding the relationships with our most sophisticated clients and ultimately acting as their key point of contact for investment in our funds and/or deal-by-deal transactions. You are also responsible for building these relationships out and for negotiating and structuring financial relationships with relevant introducers / sources of deal flow in the most appropriate manner. The role does not work in isolation and works very closely

with Westbrooke's investment teams in SA, the UK and the USA. You will report directly to the Head of Westbrooke's Distribution, Product Development, Operations and Marketing cluster.

The successful individual will be a top-achieving graduate with previous experience within the Corporate Finance, Leveraged Finance, Asset Management or Private Equity industries and must display a balance between strong technical investment knowledge, as well as the aptitude and soft skills required to interact with very wealthy clients on a daily basis. All applications must be accompanied by full academic transcripts evidencing the candidate's history of top-of-class performance.

responsibilities

- Participate in the transaction "go / no-go" decision by providing insights into client needs and investment preferences
- Provide transaction structuring input and guidance to deal teams in order to structure transactions in the manner which will be the most desirable to clients
- Based on each Westbrooke fund / transaction available, identify the relevant pool of high-net-worth clients to show the investment opportunity to
- Walk each client through the investment opportunity available and act as the Westbrooke point of contact for their subsequent due diligence on the opportunity
- Expand the base of clients who invest with the business. This can be through any means you deem most appropriate, but normally is generated through a combination of referrals and pro-active introductions through relevant strategic relationships (e.g., corporate finance advisors, lawyers, etc. – you will need to create these partnerships and negotiate the relevant remuneration relationships with these partners)
- Assist Westbrooke in identifying, designing and launching new local and offshore investment products
- Work closely with Westbrooke's operations team to design a seamless investment experience for clients (including the use of appropriate technology)
- Assist with the positioning and copy creation for marketing material across the various funds which the business offers, based on your understanding of client needs

This is an excellent opportunity for a personable, hard-working individual to join a highly professional business which gives you full autonomy to deliver results. You are also able to build a deep network amongst South Africa's most successful and wealthy individuals and build relationships of trust.

knowledge and skills

- Degree educated with very **strong academic results** and financial background. Must be educated with a CFA / CA(SA) / BCom(Hons) or equivalent. **Only candidates with the strongest academic records will be considered**
- Candidates should show a passion for deal-making and investing, especially in alternatives
- Strong interpersonal engagement and deal-closing skills
- At least 3 years post-articles work experience

behavioural competencies

- Driven self-starter with a passion for both interpersonal engagement and analysing / discussing transactions, that wants to be a part of an entrepreneurial environment
- Strategic thinker and planner
- Shows strong ownership / accountability and has the ability to run with tasks without the need for prior instruction
- Innovative and customer-focused
- Intelligent and high EQ individual with an understanding of HNWI/ UHNW and family office investment requirements
- Analytical and detail-oriented – **this is key as the investment products offered by the business are inherently complex and need to be fully understood in order to be explained to clients**
- Tenacious and strong-willed
- Ability to perform well under pressure and show maturity, confidence and resilience
- Excellent listening, communication and interpersonal skills
- Pro-active approach to work, clients and problem-solving
- Learning agility and curiosity
- Passionate ownership of client service results
- Good presentation and sales skills
- Ability to influence people and decision making
- Good interpersonal and communication skills

Send an email with your CV and academic transcripts to careers@westbrooke.co.za if you would like to apply.

Alternatively, visit the westbrooke careers page at westbrooke.co.za/careers and apply online.

