

distribution and product development: wealth partners

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, taking full control over the engagement between the business and the wealth managers ("wealth partners") who allocate client money to the business. The role requires you to be involved in various elements of the transaction / fund lifecycle: from assisting in the design of funds and investment products to be attractive to and accessible by our wealth partner base, to dealing with investment platforms and custodians in order to make our product available on their platforms, to holding the relationships with our wealth partner base (currently more than 80 wealth management businesses and over 250 advisors who actively allocate to the business) 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 subsequently negotiating and structuring remuneration agreements with these wealth partners 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 Wealth Management or Asset Management / Private Equity distribution space (aligned industries will be considered for exceptional candidates only) and must display a balance between strong technical investment knowledge, as well as the aptitude and soft skills required to interact with wealth partners on a daily basis. Importantly, candidates should have an appreciation for the nuances of private market asset investing and the opportunities / challenges faced by wealth partners in accessing the space (both operational and investment related). All applications must be accompanied by full academic transcripts evidencing the candidate's history of top-of-class performance.

responsibilities

- Act as the key point of contact for Westbrooke's extensive wealth manager network
- Based on each Westbrooke fund / transaction available, identify the relevant pool of wealth management clients for whom the investment opportunity would be best suited
- Engagement with platform providers / custodians in order to make Westbrooke's product offering available through as many access points as possible
- Walk each wealth partner through the relevant investment opportunity available and act as the Westbrooke point of contact for their subsequent due diligence on the opportunity
- Present directly to the clients of Westbrooke's wealth partners (on request of the wealth partner)
- Frequent in-person engagement with our South African network of wealth partners, through periodic roadshows and related entertainment campaigns
- Expand the base of wealth partners 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 proactive seeking out of new potential wealth partners who might consider allocating to the business
- 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 wealth partners' 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.

knowledge and skills

- Degree educated with very **strong academic results** and financial background. Must be educated with a CFP / CFA / BCom or higher. **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
- Must show relevant experience either working at a wealth management business or frequently engaging with wealth managers and therefore deeply understanding their needs

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 wealth managers and their 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.

