



**Social  
Investment  
Scotland**

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JOB SPECIFICATION

# Investment Assistant

COMMUNITIES - MAY 2019

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# Investment Assistant

**SALARY**

Circa £23,000

**RESPONSIBLE TO**

Lead Fund Manager

**LOCATION**

Edinburgh, with flexibility

**CONTRACT TYPE**

Permanent full time, with some flexibility



## Social Investment Scotland

### Our values

- Purpose: we are purpose driven - we are committed, innovative and impactful;
- Integrity: we do what we say - we are reliable, honest and consistent;
- Unique: we embrace the power of difference - we are inclusive, open and ethical;
- Partnership: we grow strong partnerships - we are collaborative, confident and respectful.

### About us

Social Investment Scotland (SIS) are a social investment finance intermediary (SIFI) operating across Scotland and beyond. Our mission is 'to connect capital with communities, to make a real, measurable and sustainable impact upon peoples' lives.'

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This connection happens in two ways. We help social enterprises and mission driven businesses access the finance and support they need to support delivery of their own missions; and we support a growing community of social investors - looking for both a financial and a social return on their investment - access opportunities.

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## Purpose of role

The Investment Assistant (IA) has overall responsibility for the organisation's interactions with its customers and colleagues in relation to supporting clients through the legal due diligence process in order to receive investment. More specifically, the IA will support the Investment team that has day to day responsibility for all interactions with existing and potential customers, including business development, the investment pipeline process, the loan approval process and ongoing customer relationship management.

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## Responsibilities will include

Overall responsibility for the smooth and efficient administration of the Investment team:

- Leading the process from approval to drawdown
- Overview and reporting of the organisation's investment pipeline
- Supporting key investment committees providing administrative support

The IA will work closely with the Lead Fund Managers and Investment Managers ensuring that the organisation delivers an excellent customer experience, which can include customer contact at enquiry as well as throughout the investment approval and drawdown stages.

Updating and maintaining the CRM and loan management system, including report production, to ensure smooth deal flow and customer satisfaction.

Monitor receipt of management information highlighting specific issues to an investment manager where appropriate.

Strong IT skills with experience of Microsoft Office suite is required. Specific training on our CRM system can be given.

An understanding or desire to learn and be directly involved in Social Investment is essential.

Desire to get involved in wider projects outside of normal activities would be a strong benefit.

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## Benefits of working at Social Investment Scotland

We will ask a lot of successful candidates - but in return working life at SIS offers:

- The privilege, and responsibility, of working for a leading organisation with an ambitious mission.
  - A range of formal and informal training and learning opportunities.
  - A competitive salary and benefits package that is regularly benchmarked against similar organisations and that includes a contributory pension plan, child care voucher scheme, generous annual leave entitlement and other benefits.
  - Flexible working arrangements.
  - The chance to work with exceptional colleagues who lead by example and provide a source of support and encouragement.
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## How to apply

We are recruiting through BeApplied, a fair recruitment platform. Please apply at the link below:

<https://app.beapplied.com/apply/g1ml2gbdoi>

Applications close at 11.59pm on 2<sup>nd</sup> June 2019.

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