

FUTUREGROWTH ASSET MANAGEMENT IS RECRUITING!

We have an exciting opportunity available for a **Client Associate** in our Business Development team.

Futuregrowth is committed to transformation. A strong preference will be given to suitably qualified previously disadvantaged candidates.

Client Associate

Are you passionate about investments and seeking a rewarding career in fiduciary asset management? Do you have strong communication and interpersonal skills; are you highly organised and adaptable, with a strong ethical base? Then this position might be for you!

Who is Futuregrowth?

Futuregrowth has been South Africa's leading developmental, responsible, and fixed-income investor for over 25 years. We manage a range of fixed interest and development funds and play a key leadership role in the South African asset management industry. We are committed to responsibly investing our clients' funds, with the interests of our clients always coming first.

Purpose of the position

As part of a team, the successful incumbent will ensure smooth and efficient service delivery by managing and giving direction to those providing operational support to the Business Development team. This role involves building and maintaining strategic relationships with existing clients, managing due diligence requirements, and coordinating client communications to support the sales process.

Key responsibilities of the position

1. Operational Support

- Assisting client-facing staff with day-to-day operational requirements;
- Preparing and managing documentation for client meetings and presentations; and
- Coordinating with internal departments to ensure superior client service delivery.

2. Client Relationship Management

- Query (Case) Management
 - Acting as a point of contact for client inquiries in the Business Development Team;
 - Evaluating and distributing client queries to relevant staff to resolve to ensure timely resolution; and
 - Managing query resolution end-to-end.

- Customer Relationship Management (CRM) data quality management
 - Managing and updating CRM to ensure data accuracy and quality;
 - Ensuring data integrity and accuracy through regular audits and updates;
 - Capturing and monitoring the completion of meeting notes, follow-up actions and tasks on the system and marking them as complete, once done;
 - Accurately recording all sales activities and insights from client engagements to aid decision-making;
 - Maintaining client distribution lists; and
 - Growing, maintaining and updating CRM Database with all client data.
- Generating reports and analytics to support business development activities.

3. Client Engagements

- Building and maintaining strategic relationships with existing clients;
- Coordinating and participating in client meetings, calls, and events;
- Preparing agendas, minutes, and follow-up actions for client engagements;
- Supporting the development and execution of client engagement strategies; and
- Maintaining and continuously seeking to improve the end-to-end client engagement process.

4. Due Diligence Management

- Overseeing due diligence processes for existing and new clients;
- Ensuring compliance with regulatory requirements and internal policies; and
- Preparing and reviewing due diligence documentation and reports.

5. Client Communication Coordination:

- Engaging Marketing and provide input to the compilation of client communications, including newsletters, updates, announcements, and scheduled mailers;
- Evaluating and assessing the communication requirements with client-facing team members as well as the investment team;
- Coordinating with marketing and communications teams to ensure consistent messaging; and
- Managing client feedback and follow-up actions.

6. Sales Process Support

- Assisting in the preparation of sales proposals, presentations, and pitches;
- Tracking and reporting on sales pipeline and performance metrics;
- Supporting the business development team in identifying and pursuing new business opportunities; and
- Supporting Sales Retention activities as well as ad hoc tasks as required.

7. Projects

- Project managing and supporting key Business Development strategic initiatives (for example competitor analysis); and
- Executing User Acceptance Testing as and when required, whilst managing business-as-usual responsibilities.

8. Tender Management

- Monitoring and identifying relevant tender opportunities in the asset management sector;
- Maintaining a tender calendar to track submission deadlines and requirements;
- Ensuring that all tender submissions are professionally presented and free of errors;
- Ensuring timely submission of tenders by managing the tender process from start to finish;
- Gathering and compiling necessary documentation and information required for tender submissions;
- Ensuring all tender submissions comply with regulatory and company policies;
- Analysing successful and unsuccessful tenders to identify best practices and areas for improvement; and
- Implementing process improvements to enhance the efficiency and effectiveness of tender submissions

Additional Responsibilities

- Stay updated on industry trends and regulatory changes;
- Participating in training and development programs to enhance skills and knowledge; and
- Contributing to the continuous improvement of business development processes and practices.

Technical/ professional qualifications and experience

- Bachelor's Degree with Post Graduate qualification in financial markets, investment management or related field;
- 3 - 5 years of experience in client services, business development, or a related role within the financial services industry;
- Strong commercial acumen and an understanding of asset management products and services; and
- Proficiency in CRM software and Microsoft Office Suite (Excel, PowerPoint, Word).

Behaviours and Competencies Required

- **Client-Focused:**
 - Demonstrates a strong commitment to client satisfaction and relationship building.
 - Client Relationship Management experience within the financial services industry is advantageous.
 - Driven to meet and exceed client expectations and contribute to the company's overall success.
- **Detail-oriented:** Pays attention to detail and ensures accuracy in all tasks.

FUTUREGROWTH

/ ASSET MANAGEMENT

- **Organised:** Manages multiple tasks and priorities effectively.
- **Communicative:**
 - Excellent verbal and written communication skills.
- **Proactive:** Takes initiative and anticipates needs.
- **Team Player:**

Works collaboratively with colleagues and contributes to a positive team environment.

 - Display high energy levels with a “can do” attitude;
 - Collaborate effectively with internal teams, fostering a cohesive and supportive working environment.
- **Analytical:** Strong analytical skills and the ability to interpret data and generate insights.
- Have excellent listening skills with **strong emotional intelligence;**
 - Have good negotiation, and organising skills;
 - High attention to detail;
 - Display good decision-making and judgment;
 - Be articulate and confident;
 - Have learning agility (curiosity and willingness to learn);
 - Display drive, purpose, and initiative; and
 - Adhere to high ethical standards, act in clients' best interests, and maintain strict confidentiality.

Recruitment process

Selected candidates will need to attend a series of competency-based interviews/ activities and a psychometric assessment.

Application Link

[Click here to apply](https://bit.ly/4szDZlw) (https://bit.ly/4szDZlw)