



Kepler

Kepler Partners LLP
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Investment Trust Sales Analyst

Overview: Kepler Partners

Kepler Partners is an independent advisory and asset-raising boutique specialising in the regulated funds market. Our business is constructed from four core verticals:

- Alternative UCITS research and consultancy
- Fund Platform - Kepler Liquid Strategies
- UCITS asset raising
- Investment trust services

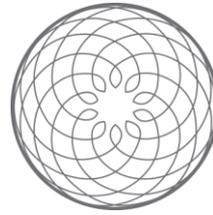
Kepler is entirely independent and is solely driven to provide the best level of service for its clients.

Absolutehedge.com is an alternative UCITS database and research platform aimed at the professional allocator community. Alongside a database of funds, our services include fund research reports, strategy research, and research on key topics and developments within the sector.

Kepler Partners LLP is an FCA authorised investment manager. Our investment vehicle - Kepler Liquid Strategies (KLS) - is a Dublin domiciled UCITS umbrella platform on which we host third party managers. There are currently 5 active funds on the platform, with exciting new fund launches in the pipeline.

The investment trust sales team is retained by 18 highly regarded corporate clients to provide direct sales and marketing services. In addition to this, we have a leading investment trust research service that is retained by more than 70 corporate clients and publishes research via www.trustintelligence.co.uk which reaches thousands of institutional and retail investors on a monthly basis.

Kepler is a limited liability partnership and currently there are 33 staff. Kepler has offices in London (HQ) and a subsidiary in Frankfurt.



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Kepler Partners pride themselves on competitive benefits including; competitive compensation structure, profit share scheme, private medical insurance, pension scheme and other benefits such as yearly company offsite, regular social events, travel subsidies and 25 days holiday.

The Position

We are looking for an Investment Trust Sales Analyst to join the investment trust team, working closely with three others. The role will entail both supporting the existing team day to day and also interacting with investors, whilst building a knowledge of the investment trust sector, Kepler's corporate clients and institutional investors in London and regionally.

It is our expectation that, in time, this person will become a Sales Associate with responsibilities for engaging directly with a wider quorum of key investors and our corporate clients themselves.

This person will report directly to Hugo Rynsard-Perry who leads this part of the business.

The Role

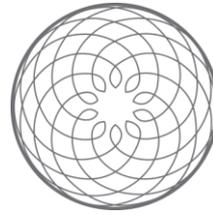
- Responsibility for directly servicing and interacting with some of our existing investor contacts in the regions across the UK, with a view to expanding this contact base over time.
- Supporting the sales team in arranging investor roadshows (virtual and physical) and ad-hoc client specific investor engagement/activity: helping to prepare itineraries, produce feedback reports and identify key investor targets for further engagement.
- Utilise our internal systems and MI to identify and build relationships with prospective investors across the UK.
- Support team to manage client relationships ensuring all reports and feedback is provided in a timely manner.
- As directed by Kepler client lead, prepare necessary information required for company board meetings etc.
- Provide detail analysis on company shareholder registers.
- Dealing with any other ad hoc requests from the sales team, and/or their clients.

The Individual:

The successful candidate will have worked in a sales-based environment before, preferably within financial services. They will be self-motivated and have the ability to multi-task. As a small but growing business, we are looking for people who are keen to make a difference, be confident to make suggestions and improve how things are currently done. The role will be varied so a willingness to embrace that is essential.

The successful candidate will possess the following attributes:

- Strong communication skills; comfortable dealing with clients and within the business generally.



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- Strong analytical skills and good written English to assist with reporting to clients and preparing reports.
- Once fully up to speed with the role, the ability to work independently to get the job done.
- Sound Microsoft word and excel skills, a preference for someone who has worked with salesforce before but this is not essential.
- Someone who is organised, efficient and can be relied on to do what is expected of them.
- Excellent attention to detail.
- Minimum 2 years' experience, preferably within a financial services firm.
- The successful candidate will hold the highest standard of integrity, and business ethics.

Kepler Partners LLP is a successful company with ambitions and a clear focus. Our company values centre around integrity, entrepreneurship, thought leadership and being standard bearers in our industry. We are looking for someone who will maintain these values and be additive to the business and its future.