



# Kepler

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**Kepler Partners LLP**  
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## Investment Trust Sales Associate Director

### 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](http://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 37 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, private medical insurance, pension scheme and other benefits such as yearly company offsite, regular social events, travel subsidies and 25 days holiday.

## **The Position**

Investment Trust Sales Associate Director

## **The Role**

This role will be to join an established investment trust team, with a specific focus on the ongoing sales and distribution of our 18 investment trust clients to professional investors across the United Kingdom. We anticipate the right candidate will be given all the support necessary to succeed but also the opportunity to take on responsibility and grow within the team and wider business.

### **Specific responsibilities will involve:**

- Be a proactive part of an enthusiastic team focussed on building excellent relationships with investors up and down the country. Maintaining and building relationships with a broad range of professional investors that can and do buy Investment Trusts.
- Take responsibility, for a proscribed number of regions outside of London. There will also be London based investor contacts to cover.
- Play an active role (alongside Hugo Rynsard-Perry) in transitioning our direct sales activities towards a high value added, sales orientated approach. Make suggestions on process, help keep the team motivated, and ensure your time is optimised to achieve results for our clients.
- Lead from the front, by demonstrating a willingness to get out and see investors. Manage and develop your book of investor contacts; talking to and seeing these investors regularly, utilising our high quality investment trust research, and where required, booking up investor meetings with our investment trust clients, accompanying fund managers to these meetings (whether that be virtually or physically) and then proactively following up after the meetings with feedback calls to maximise sales of our client trusts.
- Play an active role in IPO's & Secondary Fundraisings for existing investment trust clients.
- Take on client management responsibilities, create a marketing plans, liaise directly with the client and present at board meetings when/if required. Help to manage Kepler client relationships - this can involve additional reporting, analysis and interaction with the fund manager and Board, as well as proving the effect of our marketing activities as regards client registers
- Look for opportunities to pick up additional clients.

### **The Individual:**

- This person should have had plenty of experience with talking to professional investors in the UK and with established regional and London based relationships
- A good understanding of the investment trust market



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- A reasonable understanding or knowledge of the broader investor landscape in the UK and who buys investment trusts and why
- A good communicator and personable individual; much of what we do involves direct contact with investors and clients. This person should be comfortable communicating in person, over the telephone or via video conferencing.
- We are required to report and feedback to clients regularly. An ability to be able to write well and articulate points is essential.
- Self-motivated and proactive. This person will be joining a small but experienced team, they should be proactive in their thoughts and be willing to work independently when required but also collaboratively with the rest of the team (including open-ended sales team at Kepler).
- Team player. Kepler is a fast-growing business. We are looking for someone who wants to help us re-energise our direct sales offering, to grow with us and be a part of our future. There are a number of synergies between our different businesses and therefore being part of a team and supporting each other is essential.
- Travel: We anticipate this role will involve some travel within the UK, occasionally overnight.
- This person should also be organised and be good at working to deadlines. This person should be comfortable with being able to manage their time so as to achieve as much as possible for a varied client-base.

Kepler Partners LLP is a successful company with ambitions and a clear focus. Our company values centre around integrity, entrepreneurship, expertise, and energy. We are looking for someone who will maintain these values and be additive to the business and its future.