



# Kepler

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## UCITS Team Assistant

### Overview: Kepler Partners

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

- Kepler Liquid Strategies – UCITS Asset Management platform focusing on alpha generating strategies
- Alternative UCITS research and consultancy
- UCITS capital raising
- Investment trust services

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 our own Emerging markets fund and six externally managed strategies selected via our detailed research process. Assets under management is currently \$2bn.

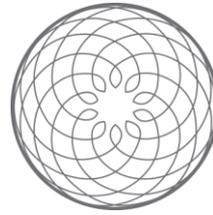
Managers for our platform are selected via AbsoluteHedge.com, an alternative UCITS research platform aimed at the professional allocator community. Through our coverage of the Alternative UCITS sector we provide advisory services to a select number of wealth management clients, advising them on their alternative allocations. We also write strategy research and host conferences across Europe.

Separate to this, our investment trust 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 headquartered from London, with a subsidiary in Frankfurt. We are currently a team of 37 people and offer a 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

We are looking for a team assistant to join our team in London, with a particular focus on supporting the sales team and the two senior partners responsible for managing the UCITS team. The sales team is currently three full-time experienced salespeople in London, with one currently on maternity leave.



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The London team is part of a wider team of 7 people: two salespeople in Germany and a long-standing 3<sup>rd</sup> party agreement with a two-person sales team in Spain.

This successful candidate will be working with and supporting the two senior salespeople in London, reporting to and working closely with the partner responsible for the UCITS sales team. This is an experienced team who have been responsible for raising over \$4bn for Kepler clients from institutional investors across Europe.

In addition to this you will be required to support the two senior partners responsible for the UCITS business, helping them managing their busy schedules and efforts to continue to grow the business.

This role has arisen due to Kepler's continued growth and our expanding footprint and investor base across Europe, and beyond. In order to continue to grow and service the investor base we now have, we require more resource to support the team, service our clients and help us to continue to grow. This is an excellent opportunity for someone who is looking to join a growing business.

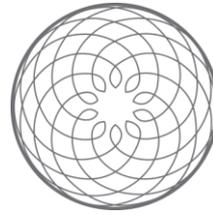
## **The Role**

This will be a diverse role supporting the sales process and senior people in the business. Responsibilities will include:

- Assisting with client reporting requirements, these can be regular reporting requirements or ad hoc.
- Assisting with the co-ordination and preparation of marketing materials, including the monthly fund factsheets, presentation materials, roadshow itineraries and feedback reports.
- Working with our events team to co-ordinate and organise the quarterly client calls we hold with our funds and their investors/prospects as well as assisting with other events and conferences that our funds participate in.
- Working with our software systems, Salesforce (CRM), Profund.com (marketing), Cvent (events) and Absolute Hedge (research database) to make the team as productive as it can be. Co-ordinating, managing and integrating our CRM system Salesforce to ensure the information saved down is accurate and up to-date. Generating reports from Salesforce that can help direct the sales teams activity.
- Participating in weekly and monthly meetings, minute taking and circulating action points. Ensuring these action points are followed up with.
- PA duties to the senior partners will include a variety of responsibilities to support their efforts. This could include booking their travel, coordinating meetings, expenses and numerous other ad hoc requests.
- When required, attend client meetings (virtually or in person) and be willing / prepared to be an additional point of contact for key investors, particularly when the sales team are travelling.

## **The Individual:**

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



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industry. We are looking for someone who will maintain these values and be additive to the business and its future.

In addition to this it is expected this person will currently be working in the asset management industry and have a minimum of 2yrs of experience within a similar role. We are looking for a highly organised, self-motivated and personable character who is looking for a varied role, be a proactive member of the team and be willing to roll-up their sleeves.

The person must have excellent attention to detail, good writing skills and be presentable at all times. They must demonstrate excellent project management skills and deliver work in a timely manner. Good communication and organisational skills are key, both for liaising and working effectively with team members internally, but also externally with clients. Finally, a can-do and positive attitude with the ability to work within a fast-paced team environment where priorities are constantly changing are equally important.

It is also expected this person will be competent in word, excel and PowerPoint, and preferably will have worked with Salesforce.