

EDITION CAPITAL

Client Services Associate

About Edition Capital

Established in 2016, Edition Capital is a fast-growing investment and advisory group focused on entertainment and leisure. The investment arm provides capital to businesses, and the advisory arm provides financial and commercial services to clients.

Edition's EIS fund, Edition EIS, has raised and deployed £17m into 12 companies since April 17. The current portfolio includes; festivals (Snowboxx, Cool Britannia, Prosecco Springs); live music venues (Oval Space, Pickle Factory); leisure venues (Pergola on the Roof, The Prince, Little Yellow Door, The Crystal Maze Live); television (The Wine Show); and wellness (Hotpod Yoga).

Purpose of the role

The role will sit within the investment team, leading the client services process for Edition's customer base. This is a role in an industry-leading team, offering the opportunity for a committed candidate to own the client services process throughout the investment lifecycle.

Client services sits at the heart of the organisation and the successful candidate will support the day-to-day running of the business as well as acting as the front line of support for clients. Edition's clients include financial advisers and intermediaries, retail investors, banks and HNW individuals. As a small but rapidly growing business, the client services responsibilities are wide ranging, covering post sales client support as well as several different operational procedures.

The role will suit a candidate with experience in a client services team with strong organisation and interpersonal skills, as well as a keen personal interest in entertainment and leisure.

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Key Accountabilities

- **Enquiry Management** – handling inbound calls and emails from all stakeholders including financial intermediaries, investors and third parties, delivering exceptional client service
- **Client Reporting** – producing monthly investor reports for nationwide financial advisory/intermediary networks
- **Client Communications** – producing, checking and distributing biannual client communications
- **Oversight of Custodian** – working with Edition's outsourced custodial and administrative partners to ensure seamless service delivery for clients
- **CRM** - assisting with implementation of a new CRM system and leading its ongoing management
- **Application Reconciliation** – reconciling investment applications received and tracking those expected
- **Innovation** - identify opportunities for innovation within the client services function

Role Requirements

Essential

- Previous experience in a similar role, fielding and responding to client and financial intermediary queries to the highest standard
- Clear, concise and articulate with excellent interpersonal skills, specifically an excellent telephone manner and command of written English
- Robust process skills
- Experience using CRM systems
- Drive, ambition and self-motivation with the ability to work autonomously
- Intermediate Excel skills
- Comfortable working in a close knit and fast-growing team and willingness to pitch in when necessary

Desirable

- Experience within the EIS market
- Experience working within the financial advisory community
- Active interest in entertainment and leisure industries