



MINARD CAPITAL

POSITION SUMMARY
Senior Client Relationship Manager

About Minard Capital:

Minard Capital offers outsourced institutional marketing and asset raising consulting services to alternative investment firms around the world. Minard Capital is not a broker-dealer nor a third party marketing firm. The firm is a fee-for-service consultancy, dedicated to delivering more efficient and effective marketing and branding tactics to raising a firm's assets, brand profile and sales efficiency.

Leveraging nearly 23 years of global asset raising experience, we are a supplement to global marketing teams, helping to identify, qualify, grow and close new business. Current contracts include: building an institutional-quality marketing infrastructure, presentation scripting, market and investment channel intelligence, short-lists of viable institutional prospects and strategic marketing programs to shorten the global sales-cycles and maximize the efficacy of existing marketing teams.

Minard Capital was founded in 2011 by Rachel S.L. Minard, *Chief Executive Officer*, a world-renowned hedge fund marketing expert who has raised over USD \$10 billion in assets across 18 countries spanning her 23 year career. Ms. Minard also built four (4) fund of hedge fund firms from scratch, each to award-winning recognition.

Our Culture:

Located in the heart of Union Square, San Francisco, Minard Capital is a boutique, thriving and innovative firm that is changing the face of the asset management industry. Entrepreneurial in nature, our firm values team members who are excited about applying their expertise and creativity to the daily needs of our global clients.

A successful Minard Capital Team Member will possess the following attributes:

- Strong work ethic with dedication to high-quality work and exceptional attention to detail;
- Genuine care for people with a commitment to high touch client service;
- Thrives in a fast-paced, ever-changing environment;
- Critical thinker with the ability to produce original thought; personal point of view imperative;
- Employ authentic, honest and direct communication at all times;
- Embody personal accountability as a non-negotiable professional value;
- Personal alignment with and commitment to our operating motto: "Do it once, do it right."

Minard Capital is committed to supporting its employee's personal and professional development and offers access to training, advancement opportunities, and mentorship.



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Position Description:

The position of Senior Client Relationship Manager is a senior-level role within the firm reporting directly to the CEO. The Senior Client Relationship Manager is responsible for the daily high-quality management of client relationships and the timely execution of all client deliverables. This position is based in San Francisco.

Specific responsibilities include, but are not limited to:

- Maintain customized *Client Progress Reports* for multiple clients and ensure the timely and accurate execution of all client deliverables;
- Collaborate with CEO to ensure successful onboarding of new clients;
- Collaborate with the Creative Director to produce presentation materials, one page summaries, logos, websites and formal brand guidelines, ensuring consistency across all marketing collateral;
- Perform primary research in both our proprietary and external databases to identify natural buyers actively allocating to our clients' strategies;
- Construct and manage *Revenue Generation Pipeline Reports*, highlighting key prospects and allocators with the proclivity and ability to actively invest in our clients' strategies, ensuring the status for each prospect is properly tracked and updated;
- Conduct investor outreach by telephone and e-mail to secure calls and/or meetings with clients' key prospects;
- Schedule, manage and execute all client and prospect calls, meetings and events including the preparation and follow up on behalf of the client;
- Schedule, manage and execute all client investor roadshows, events and conference participation, which may include creating marketing collateral, agendas, event invitations, investor profiles and follow-up reports;
- Organize, produce and manage collateral materials necessary for any conferences the CEO attends on behalf of our clients;
- Update CRM Database and related applications to ensure accuracy of all relevant client and prospect information;
- Perform additional related duties as requested by the CEO.

Background Description:

We are seeking a highly evolved communicator and talented project manager with a strong knowledge of capital markets and asset management. This individual is expected to have strong project and people management experience, and to possess the ability to be "ten steps ahead" at all times regarding client deliverables.



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Required Qualifications:

- Bachelor’s Degree in Finance, Business, Journalism, Marketing, English or a related field;
- 3-5 years experience working in Financial Services;
- Project Management experience: exceptional organizational skills and precise attention to detail;
- Exceptional communication skill with knowledge of proper grammar, sentence syntax and communication etiquette. Fluency in English (both verbal and written) required;
- Strong work ethic, highly motivated and driven;
- Able to multi-task and manage time effectively, skilled at prioritization and problem solving;
- Comfortable working both collaboratively and independently;
- Entrepreneurial attitude and focus, committed to contributing new and original ideas;
- Skilled use of Apple technology for business functions a must.

Desired Qualifications:

- Master’s Degree (MBA and/or CIMA, CFA, CAIA are highly desirable.)
- Prior experience with concierge-style client management;
- Knowledge of CRM Database (Daylite); Project Management Software (provide detail in CV), Adobe Creative Suite.

Regardless of background or career path, the ideal candidate will possess the poise, passion, and drive to professionally represent Minard Capital and our clients with integrity and empathy. The Senior Client Relationship Manager must possess exceptional communication, both spoken and written.

To Apply:

To be considered for this position, kindly e-mail your CV, cover letter and two (2) writing samples as a combined PDF document to careers@minardcapital.com. Please indicate “Senior Client Relationship Manager: Candidate [Your Name]” in the subject line.

Minard Capital LLC is an equal employment opportunity employer. Applications are considered for positions without discriminating on the basis of race, color, religion, national origin, citizenship status, gender, sexual orientation, age, disability, veteran status, genetic information or any other characteristic protected by federal, state or local law. All hiring decisions are based solely on the applicant's qualifications for the position.