

JOB DESCRIPTION

Name: Vacant	Role Title: Client Relations Officer
Line Manager Name: Andrien Meyers	Line Manager Title: Chief Commercial Officer

Purpose

As a Client Relations Officer within London CIV's Commercial Team, you will provide support to the Commercial team in managing and maintaining effective relationships with London CIV's Partner Funds (London Boroughs and the City of London Corporation Local Government Pension Scheme ("LGPS") funds). Reporting to the Chief Commercial Officer, you'll help enhance the team's advisory capabilities, supporting Partner Fund asset transitions, and contribute to strengthening relationships with Partner Funds.

*For the initial 3-6 months of this position, the main focus on this role will be supporting the delivery of the Fit for the Future (FFF) programme, as the FFF programme progresses, the role will evolve in line with the delivery.

This is a hands-on role and the ideal candidate will bring curiosity, analytical skills and a proactive work ethic. The role holder will be expected to support both project work and business as usual, bringing strong organisational and administrative skills, with the ability to manage competing priorities in a fast-paced environment. You'll work closely with the members of the Commercial team as well as other internal teams to support a broad range of activities, workstreams and reporting.

This is a great opportunity for anyone who is keen to develop their career. This is a period of significant change and growth, offering an exciting opportunity to join a developing team with plenty of scope to contribute and develop their skills.

Key Responsibilities

- Act as a point of contact for our Partner Funds, their advisers and other key stakeholders in responding to requests for information on their portfolio with London CIV
- Help prepare briefing materials, reports and research to further strengthen the team's advisory capabilities and support Partner Fund reporting requirements.
- Work in collaboration with stakeholders (internal and other third parties) in the capture of useful information, its subsequent reporting and dissemination, as part of enabling the collective success of the LCIV pooling programme and wider investment strategy
- Coordinate and prepare committee and meeting packs for Solutions Manager meetings, gathering data from investment, Responsible Investment (RI) and CRM teams. Support the drafting of high-quality briefing papers for use by the Chief Commercial Officer to take to internal reporting Committees as well as Partner Fund meetings.
- Maintain a centralised bank of key commercial information for reuse across services and reporting with a mindset to enhance documentation and propose improvements.
- Contribute to documentation, scalable service models and enhancements to operational efficiency across the Commercial Team.

Note: This job description is aimed to be illustrative and is not exhaustive of all the duties and responsibilities which could be contained within this position. The role holder may be asked to undertake other duties and responsibilities which are commensurate with this area of work and grade.

- Take ownership of the maintenance and development of the Client portal and website and the relationship with the service providers (Inktrap)
- Support, and own when required, the maintenance and development of the LCIV's client relationship management system (Salesforce), ensuring that client information is kept up to date and pooling opportunities and meeting notes are captured and monitored
- Produce regular Management Information (MI) packs as required e.g. from Salesforce as required
- Support and assist with the provision of regular reporting to clients via Quarterly Investment Reports, monthly Fact Sheets and ad hoc reporting requests
- Attendance at Partner Fund, stakeholder and internal London CIV meetings as required to support the Client Relationship Manager and other London CIV colleagues involved in such meetings
- Support, and own when required, the Client Categorisation process under MiFID II regulation and be the key contact for Partner Funds to ensure that they are suitably categorised as an elective professional client as required
- Develop and manage internal and external collaborative relationships to effectively meet Partner Fund's needs and expectations
- Develop relationships with external suppliers, principally Northern Trust, our website and Client Portal designers and other providers to ensure effective and efficient operation of the client management relationships
- Engage proactively with internal teams e.g. Investment, Operations, Compliance, RI to gather information and support the coordination of commercial projects and services.

***Delivery of FFF Programme**

- Assist with collecting information and preparing materials to support the design, development and rollout of new services under the FFF programme, including Strategic Asset Allocation (SAA) from the Commercial team's perspective, LGPS PASS, and pensions officer support.
- Provide support with analytical and project coordination across asset transition activities, including maintaining workflows of Investment Management Agreements (IMAs), monitoring deliverables, timelines and risks.

Key Skills and Experience

Essential

- Strong communication skills and ability to work in a relatively small team
- A natural organiser with an attention to detail
- Flexible, and enjoys a diverse and challenging workload
- Good analytical & writing skills (report writing, formatting, data analysis etc.)
- Proficient IT skills, with experience of using a range of software packages, such as Excel, Word, Client Relationship Management (CRM) tools e.g. Salesforce, Microsoft Teams and PowerPoint with a willingness to learn new IT skills systems as the company evolves
- A self-starter with the ability to be effective with minimal supervision
- Ability to work well under pressure, organised and able to prioritise
- Client facing communication skills, presentational skills and the desire to provide an excellent client experience
- Data Analysis

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Desirable

- Experience working with public sector clients or pension schemes
- Familiarity with Investment Management Agreements and transition planning
- Experience preparing committee papers, meeting packs or briefing materials
- Understanding of LGPS structures and reporting requirements

What we offer

Our values sit at the heart of everything we do. To truly foster a collaborative and supportive workplace, we offer all employees a range of benefits, including:

- From day one, you'll have on-the-job learning opportunities across a range of asset classes and exposure to leading managers, with plenty of hands-on experience to support your development.
- Financial support and paid study leave for relevant qualifications or professional development as part of your continuous learning journey.
- A company culture that champions innovation, continuous learning, and personal responsibility within a modern and flexible working environment.
- Employees typically work in the Southwark office a minimum of 50% per fortnight. Our Southwark office operates a hot-desk system and includes access to an on-site gym.
- A minimum of 29 days' annual leave per year, plus public holidays.
- A generous pension scheme, enhanced family-friendly policies, and a variety of insurance and wellbeing benefits.

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