



**Social
Investment
Scotland**

JOB SPECIFICATION

Investment Assistant

June 2021

JOB SPECIFICATION

Investment Assistant

SALARY

Circa £25,000- £29,000

RESPONSIBLE TO

Head of Investments

LOCATION

Hybrid working arrangements - from home, office-based, community venues and combinations of all 3

CONTRACT TYPE

Permanent full time, with some flexibility



Social Investment Scotland

Our values

- Purpose: we are purpose driven - we are committed, innovative and impactful;
- Integrity: we do what we say - we are reliable, honest and consistent;
- Unique: we embrace the power of difference - we are inclusive, open and ethical;
- Partnership: we grow strong partnerships - we are collaborative, confident and respectful.

About us

Social Investment Scotland (SIS) is a social investment finance intermediary (SIFI) operating across Scotland and beyond. Our mission is 'to connect capital with communities, to make a real, measurable and sustainable impact upon peoples' lives.'

JOB SPECIFICATION

Investment Assistant

This connection happens in two ways. We help social enterprises and mission driven businesses access the finance and support they need to support delivery of their own missions; and we support a growing community of social investors - looking for both a financial and a social return on their investment - access opportunities.

Purpose of role

The Investment Assistant (IA) is often the first point of contact for the organisation's existing and potential customers/ investees and the IA will support both the Communities Team with debt funding to Social Enterprises and Charities, and SIS Ventures (SIS V), with equity funding to mission-driven for-profit businesses. Responsibilities will include supporting business development, the investment pipeline process, the approval process, the legal process to drawdown/ investment of funds and ongoing customer relationship management.

We are looking for an enthusiastic and driven individual that thrives on providing excellent service as part of a team.

Responsibilities will include

Overall responsibility for the smooth and efficient administration of SIS and SIS V investment activities for both debt and equity transactions:

- Leading the process from approval to completion
- Overview and reporting of the organisation's investment pipeline
- Supporting key investment committees providing administrative support

The IA will work closely with SIS and SIS V Investment Managers ensuring that the organisation delivers an excellent customer experience, which will include customer/ investee contact at enquiry as well as throughout the investment approval and completion stages.

Updating and maintaining the CRM and loan management system, including report production, to ensure smooth deal flow and customer satisfaction.

Monitor receipt of management information highlighting specific issues to an Investment Manager where appropriate.

Strong IT skills with experience of Microsoft Office suite is required. Specific training on our CRM system will be provided.

Support the Business Development activities of SIS and SIS V and all aspects of onboarding customers/ investees, from 1st contact to relationship management.

An understanding or desire to learn and be directly involved in Social Investment is essential.

Desire to get involved in wider projects outside of normal activities would be a strong benefit.

Ability to work on own initiative, without ongoing supervision, strong positive attitude and resilient when faced with challenges, deadlines and changing requirements.

JOB SPECIFICATION

Investment Assistant

Benefits of working at Social Investment Scotland

We will ask a lot of successful candidates - but in return working life at SIS offers:

- The privilege, and responsibility, of working for a leading organisation with an ambitious mission.
- A range of formal and informal training and learning opportunities.
- A competitive salary and benefits package that is regularly benchmarked against similar organisations and that includes a contributory pension plan and generous annual leave entitlement.
- Flexible working arrangements.
- The chance to work with exceptional colleagues who lead by example and provide a source of support and encouragement.
- Team social events

For the immediate future, SIS colleagues are all working from home in line with Scottish Government advice. Longer term options for flexible working are currently under consideration and SIS is willing to consider a range of working arrangements.

How to apply

We are recruiting through BeApplied, a fair (blind selection) recruitment platform. Please apply at the link below:

<https://app.beapplied.com/apply/1aysaytvzn>

Applications close at 11.59pm on Friday 16th July 2021.
