

# JOB PROFILE

edge  
GROWTH

Job Title	Post-investment Management ("PIM") Senior Associate	Department and Location	Capital  Johannesburg/Cape town
Job Purpose	Be part of the PIM team and help manage and grow a portfolio of high growth, early stage venture investments for a Social Venture Capital Fund (Vumela managed by FNB in alliance with Edge Growth).		
Reports To (Position)	Head of PIM	Reportees (Position)	None
Qualifications	<ul style="list-style-type: none"> <li>CA (SA), FCMA or CFA</li> <li>Undergraduate degree with a strong problem solving (e.g. Engineering, Actuarial Science, Statistics, Finance, Business Science, BSC), and / or finance underpinning.</li> </ul>	Experience	<ul style="list-style-type: none"> <li>Venture and capital investing experience, preferably in the post-investment environment.</li> <li>Preferable: 3-5 years in an investment or finance environment, preferably within a reputable investment firm.</li> <li>Alternatively: If &lt;5 years in the above then: <ul style="list-style-type: none"> <li>3-5 years in a business consulting firm, with a bias towards financial modelling, business strategy and execution / project delivery roles. Advisory services to small businesses, or</li> <li>3-5 years in a top tier accounting firm with experience in auditing companies in the investment sector.</li> </ul> </li> </ul>

## Core Activities

### Portfolio Management:

- Deliver value-added assistance to portfolio companies, including:
  - Assistance in strategy development
  - Execution management
  - Business building support
  - Access to new markets
  - Raising capital
  - Special projects to unlock value
- Assume PIM responsibility for the allocated investee/s portfolio management, of more complex investments, from deal-team handover to exit.
- Help ensure that financial reporting, systems and processes of investees meets required standards.
- Deliver special projects to unlock value at portfolio companies.
- Manage draw-down processes for additional capital to be deployed into portfolio companies.
- Assist with the preparation of regular portfolio updates to the relevant committees, help with trustee update reports and compile other reports to stakeholders as required from time to time.
- Drive financial performance management in investees.
- Assist in the preparation of a consolidated portfolio review report on a monthly, or whichever, basis.
- Assist in the development and maintenance of the PIM lessons learnt database and records.

### Governance

- Assist in ensuring effective governance and best practice within investees.

### Growth Support

- Provide support for all Growth Support, governance or 10Xe deliverables as and when required.
- Assist the PIM Principal to manage the relationship and deliverables between PIM and Growth Support, while at all times maintaining the primary engagement role with the investee company.

### Monitoring and compliance

- Assist the MCO with the preparation of all M&C related information and deliverables.

### Legal

- Provide ongoing analysis, interpretation and compliance in terms of the legal agreements relating to portfolio companies which you are responsible for.

### Operations and Admin:

- Help the PIM Head improve internal processes, procedures and policies to improve the Fund's service delivery.

- Work closely with PIM Analyst, Associates and Principal on all financial modelling, analysis or structuring aspects relating to investment companies.

Leadership Competency	Proficiency Level
Transformation	Basic
Innovation	Intermediate
Customer Centric	Intermediate
Owner Leader	Intermediate
Core Competency	Proficiency Level
Change Agile	Intermediate
Emotional Intelligence	Intermediate
Communicates with Impact	Intermediate
Operational Excellence	Advanced
Problem Solver	Intermediate
Technical Competency	Proficiency Level
Financial due diligence 4	Intermediate
Financial Modelling	Advanced
Insight generation 3	Intermediate
Equity Investing	Intermediate
Legal due diligence 2	Intermediate
Valuations and structuring 3	Intermediate
Investment Research Analysis 3	Intermediate
Risk Management	Basic
Evaluating of investment opportunities	Intermediate
Understanding BEE Codes	Basic
Budgeting	Intermediate
Investment committee reporting	Intermediate
Operations Management	Basic
Client and Stakeholder Management	Intermediate
Corporate Governance	Intermediate
Compliance Management	Intermediate
Legal Compliance	Intermediate

I have reviewed and determined that this role description accurately reflects the position			
Manager signature	Date	Employee signature	Date
<i>ABuchanan</i>	21 June 2018		
The above declarations are not intended to be an all-inclusive list of the duties and responsibilities of the role described, nor are they intended to be such a listing of the skills and abilities required to perform the work. Rather, they are intended only to describe the general nature of the role.			

