

INVESTOR RELATIONS

Bottom Line Performance with market best closing rates

- Full Collaboration with retail sales team with regards to all revenue activities
- Work with the origination team on pitching, capital raising, content creation and investor roadshows
- Work with investment teams across the organization to ensure accuracy with regards to financial reporting and projections.
- Profile client base and prepare a strategic investor plans
- Review client quarterly reports to ensure accuracy and compliance
- Maintain investor relationships, providing reports to Directors on a regular basis
- Collaborating with leadership across the organization
- Proficiency in Financial Modeling and Justifiable Projections
- SEC / REG D Compliance as necessary
- Collaborate with teams across all regions to develop meaningful marketing materials such as, sales pitch-books, strategy books, client reviews, conference presentations and educational materials for both internal and external use.
- Provide various ad hoc data research and analysis as needed.

CONTACT US FOR DETAILS