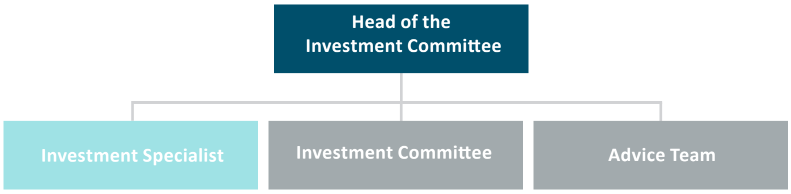
Capital Partners



Title

Investment Specialist

Position Purpose

The position of **Investment Specialist** primarily involves working directly with the Investment Committee to evaluate our investment approach and methodology aiming to ensure our clients continue to have the highest probability of reaching their objectives. This is achieved through active involvement in market research, portfolio construction and funds management.

LIVING THE CAPITAL PARTNERS CULTURE

We are driven by performance and led by values.

Our values are our code of conduct and confirm our commitment to the highest standards of ethics and business conduct.

Our Values

Success	We are passionate about doing the best we can for our clients, each other and ourselves. We are ambitious and make the most of our abilities. We are prepared to work hard to achieve our goals. We achieve the right balance between organisational and personal success.
Integrity	We strive to do the right thing. Honesty, openness characterise the way we do business.
Respect	We listen, understand and respond. We genuinely care for our clients, our business and our colleagues.
Collaborative	We behave and think as one team. We actively share knowledge, learn from each other and build consensus to work effectively across teams.
Accountable	We strive to do what we say we will do. We are clear about responsibilities and accountabilities. We take responsibility of our actions that influence the lives of our clients and colleagues.
Service	We strive to contribute before seeking reward. We are enthusiastic about feedback and constantly extend our knowledge and skills to exceed expectations and provide a superior Client experience.

Our Guiding Principles

Put clients first, always.

Earn trust, be ethical.

Invest based on evidence, not speculation.

Invest to a fiduciary standard.

Collaborate to succeed.

Think sustainably, think long term.

Drive success on purpose – yours and ours.

Key Functions of the Role

1	An acknowledgment that we are here to serve: our clients, each other, and our community;
2	Behaving in line with Capital Partners Guiding Principles and Values;
3	Be open, honest and fair in all dealings with clients, other team members and the Company;
4	Work to grow and enhance the Company's brand and reputation;
5	Follow all agreed business procedures and practices;
6	Commit to ongoing personal and professional development including maintaining the required standards for your role through an annual professional development plan;
7	Develop, mentor and grow the capabilities of other team members;
8	Maintain appropriate standards in relation to compliance with the law, ASIC and Austrac requirements, and maintain appropriate records;
9	Provide secretariat support to the Investment Committee;
10	Prepare reports utilising Morningstar and the Returns Program in support of the recommendations we make to our clients;
11	Manage and maintain governance for our CEFEX Accreditation;
12	Create educational material and communications including articles, presentations and reports that can be distributed broadly to clients, advisers and the public;
13	Manage the technical curriculum and provide training to the broader team;
14	Liaise with related parties including the Investment Committee Advisory Board, fund managers and providers in support of the Investment Committee goals; and,
15	Actively engage and manage projects including scoping an issue, building a project plan, completing the research and coordinating key stakeholders to deliver a successful outcome.

Position Requirements

Expected Behaviour

- A proactive & analytical approach to problem solving.
- Be able to work autonomously but be collaborative in your approach.
- The ability to prioritise and manage conflicting deadlines.
- Effective communication both verbally and in writing.
- Demonstrated initiative and self-motivation at all times.
- Demonstrated commitment to quality and attention to detail.
- A desire to continually extend knowledge and skills to grow and develop.
- To work effectively in a dynamic and changeable environment.
- Attention to detail, accuracy and ability to be discreet with information.
- Able to work to a high standard with minimal supervision.
- Able to approach other team members respectfully and honestly.

Required Experience

- 1-2 years experience in the financial services or similar;
- Degree qualified in a related field;
- An interest in investing, funds management and portfolio building;
- Ability to articulate, verbally and in writing, complex concepts to clients;
- Ability to interact comfortably with clients in an approachable, professional manner; and,
- A desire to consistently deliver exceptional outcomes.