

Manager, Client Relations (ANZ)

Location: Sydney preferred, open to considering other locations

New Forests seeks a qualified candidate for the position of Manager, Client Relations, ANZ. This role will be primarily responsible for servicing New Forests' institutional clients who have invested in our Australia & New Zealand (ANZ) strategies. This role will support all aspects of client relationship management for those investors.

Reporting to the Client Services Lead, this role will be a member of the New Forests' Investor Relations team. The Investor Relations team oversees funds marketing and capital raising, as well as client relations and reporting for New Forests. The team operates in a fast-paced environment with a strong focus on high quality, long-term and transparent investor relationships.

This role will be responsible for servicing clients across New Forests' investment products in the ANZ region by implementing and coordinating all aspects of client relations in the areas of quarterly and annual reporting, annual meetings, field tours, and managing responses to client queries. The Manager, Client Relations, ANZ will work closely with New Forests' Investor Relations team, funds management team, and finance team in the delivery of client support services. The Manager, Client Relations, ANZ will work with the rest of the Investor Relations team in supporting a core of high- quality institutional clients with timely, thoughtful, and accurate information regarding their assets and New Forests' services.

New Forests is a global investment manager of nature-based real assets and natural capital strategies. We manage a diversified portfolio of sustainable timber plantations and conservation areas, carbon and conservation finance projects, agriculture, timber processing and infrastructure. We aim to generate shared prosperity for our clients and the communities in which we operate and accelerate the transition to a sustainable future.

The Manager, Client Relations, ANZ will be primarily responsible for the following functions:

- **Coordination, management, and distribution of quarterly and annual reports -** Coordinate closely with the finance team, funds management teams, compliance officer, and the ANZ Managing Director to produce and distribute quarterly reports, side letter reports, and other special reports to clients. This involves close proofreading, editing and some report writing, as well as coordinating responses to any follow up questions from clients.
- **Management of annual investor meetings -** In conjunction with relevant individuals and teams, coordinate annual meetings and investor tours in the ANZ region. Manage process related to and contribute to production of annual meetings content, presentations, delivery, and meeting logistics. This involves preparing the annual meeting presentations based on the narrative put forward by each investment strategy team, working closely with the Investor Relations team on the approach and messaging.
- **Manage client records -** Collect and maintain accurate client records including contact information, investment information, memberships on advisory boards and investor voting directions. This will include managing client onboarding processes from time to time in conjunction with the capital raising team.
- **Support management of client issues -** Coordinate and provide timely and thoughtful responses to ad hoc investor queries related to accounting, financial analysis, and asset management, coordinating with finance team and Fund Leads as appropriate. This involves working closely with both the Investor Relations team as well as the finance team to best

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manage client relationships across all ANZ investment vehicles.

- **Support efficiencies and improvements in client services and reporting** - Work with finance and portfolio management teams to continuously improve internal information management systems to deliver high quality client reporting.
- Establish, engage with, and maintain key relationships with New Forests' clients invested in our ANZ strategy to support a high quality, service-oriented investor relations program.
- Work closely with Investor Relations team and funds management teams to ensure the ANZ client servicing program delivers on New Forests' business plan.
- Some travel within the ANZ region and internationally as required.

We are seeking candidates with the following qualifications, experience, and strengths:

- Strong experience in client relationship management with a preference for candidates who have 5+ years' experience working with institutional investors in a funds management/ alternative assets environment (e.g. timber, agriculture, infrastructure, real estate, private equity) and/or impact investing.
- Excellent project management capability. Excellent organisational skills related to time management and project management are essential to this role.
- Demonstrated capacity for maturity and confidence in managing institutional investor and business relationships in the financial services sector.
- Excellent writing and editing skills. Must be able to conceptualise and understand how to communicate complex information to investors through presentations, reports, briefing notes, and other media, and be able to work with other people in New Forests to develop high-quality materials in a timely manner.
- A demonstrated and knowledgeable interest in sustainability and responsible investment.
- Must be a team player and work well under pressure and deadlines.
- Minimum Bachelor's degree in business, economics, finance, liberal arts, or equivalent preferred.
- A high degree of proficiency in Microsoft Office (Word, Powerpoint, and Excel).
- Previous experience in using CRM and client portal systems and working with external fund administrators beneficial.

What can we offer?

We pride ourselves on having a supportive New Forests culture that is inclusive to all and we would love to learn how you can bring your unique skills and experience to our business. If you have experience in any of these areas, we encourage you to apply for our roles, even if you only meet some of the criteria.

To apply, please provide your resume in PDF format. Phone calls will not be accepted however you may contact us through email: careers@newforests.com.

New Forests is a Certified B Corp and an Equal Opportunity Employer that values diversity and inclusion. We offer flexible working arrangements to all employees to support their work/life balance.