

## ROLE PROFILE – PORTFOLIO INVESTMENT MANAGER

### LONG HARBOUR BACKGROUND

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Long Harbour is an established UK real-estate investment manager with assets under management of £2.4bn; they are the UK's second largest residential freeholder. The business has three key investment programmes, backed by global insurance, pension schemes and UK academic endowments, with a key focus on Build to Rent ("BTR") investments. Since 2013 Long Harbour have invested in over 2,000 apartments in the UK representing over £700mn of BTR assets. The business has significant capital commitment with a drive to having 5,000 units under management in the next 3 years.

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### ROLE OBJECTIVES

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Provide proactive support to the senior management team across treasury and investment management activities, working in a collegiate but challenging manner, and delivering investment insights through rigorous financial analysis and commercial acumen.

This individual will be joining the firm at the start of a significant growth stage, with a pipeline comprised of Build to Rent and Residential led mixed-use development schemes and will report to the Capital Solutions Director

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### KEY TASKS

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#### Financing

- Assist in developing new and managing existing relationships with third party providers of debt finance, through regular contact with key market participants and maintaining knowledge of lender appetite and available terms across the market.
- Assist in managing the performance of existing loans, through supporting the delivery of regular reporting and compliance certificates and taking responsibility for the loan portfolio risk register.
- Support the senior management team in analysing financing options and ensuring optimised capital structures across the LHMf business.
- Be a lead actor in any debt financing transactions, including preparing information packs, negotiating heads of terms, documenting the loan facilities, and managing the activities of the professional team to ensure efficient delivery of such financing.

#### Investment management

- Take a lead in reviewing existing financial models used across the LHMf business and develop these further in line with evolving group requirements. Manage and oversee formal model review processes.
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# LONG | HARBOUR |

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- Be a data efficiency champion, supporting the senior management team in looking at how KPI's are used across the business and how they are integrated into underwriting models and ongoing financial / operating performance assessments and reporting, ensuring fit for purpose for both internal and external audiences.
- Working closely with the development, asset management, treasury, Way of Life and Environmental, Social and Corporate Governance (ESG) teams, review assumptions underpinning the underwriting models for new business opportunities, ensuring modelling accuracy and critiquing and challenging commercial inputs.
- Support the continuing evolution of financial models used for investment management purposes, working closely with the financial and asset management teams to articulate in financial terms the strategy and business plans for individual assets through the acquisition and development and operational lifecycle.

## General

- Provide transaction support where required across the business, assisting with information memorandums, strategic decision making, documentation, coordination of third-party advisers and closing.
- Assist in preparing board papers and presentations for senior management as required in support of analysis of strategic investment decisions.

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## EXPERIENCE / QUALIFICATIONS

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- High levels of business acumen, including a clear grasp of financial models, costing and budgets, along with the know-how to assess and manage risk.
- Significant experience of strategic planning and managing multi-faceted teams, coupled with the vision needed to see, set and develop future agendas.
- Excellent communication, influencing and relationship management skills, backed by a good degree of personal credibility, stature and gravitas.
- A natural management style and collegiate approach to leadership, highlighted by the ability to inspire and get colleagues to positively 'buy-in' to your ideas and actions.
- RICS or CFA qualification or equivalent.
- Strong IT skills Excel (cash flow analysis), PowerPoint, Word, Project.
- Strong time management capabilities.
- Capable of building strong relationships with a demanding team.
- Excellent negotiating skills, decision making ability and judgement.
- Personality to be suited to work within a small company and ability to work independently.
- Organised and thorough, with excellent attention to detail.
- Good communication skills and Fluency in English is required.
- Experience within the BtR / PRS / Student Accommodation or Hotel sector, although not essential.