

Investment Associate

Role Description and Recruitment Pack



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Role overview

Title:	Investment Associate
Hours:	Full time (35 hours per week)
Contract:	Permanent
Location:	1 Lamb's Passage, London, EC1Y 8AB. <i>Expected to be in the office twice a week during the probationary period to help ensure a smooth transition and success in the role.</i>
Reports to:	Investment Manager
Salary:	£40k-45k p.a. depending on skills and experience
Closing Date:	<i>Applications will be assessed when they are received, so early application is encouraged.</i>

Why this position is important to us

Our Finance & Investments team has undergone a remarkable change in the last three years. The Finance and Investments team has worked hard to become true partners with the rest of the organisation helping to shape decisions. The Investment Associate role is no different – working closely with the Donor Advised Fund and Philanthropy Fund Teams and providing investment expertise to the wider organisation.

As part of our strategy work in 2023, we identified the need to expand our investment product offering for our Donor Advised Fund and Philanthropy Fund clients. To achieve this, we need to improve our existing investment due diligence, execution and monitoring processes to create a firm foundation onto which we can add new investment products. This role will primarily focus on shaping the investment management and creating new monitoring processes for donor-advised and Stewardship-led investments.

The impact you will have in this role

This is an exciting opportunity to join a growing investment team as the second hire, alongside our Investment Manager. You will help recognise our growth ambitions – by increasing our capacity and capability to service and grow our high net-worth client offering, alongside our award-winning philanthropy teams. Your contributions will be key to the success and future direction of the team

Welcome to Stewardship

Big or small. First or last. Given or received. We make every gift count.

We're a place where connection happens - where those called to give meet those called to go. A community of generous stewards uniting to use all God has given us to love Him, love one another, and love our neighbours as ourselves.

We help Christians give and we strengthen the causes they give to.

We call this **Active Generosity**.

Our vision, mission and values

Our vision is to a thriving Kingdom economy where God's people steward resources generously to advance the Gospel. We help Christians be the best stewards of the resources God gives them.

Our four core values underpin all the work we do at Stewardship:



To find out more about Stewardship, [please view our short video clip](#)

Job detail

Overview

We are looking for a proactive and driven Investment Associate with strong attention to detail, intellectual curiosity, and excellent communication skills to join our dynamic Finance & Investments team managing over £200m in assets and in partnership with our Donor Advised Fund and Philanthropy Fund Teams. The Finance & Investments team consists of three specialisms: Financial Control, Finance Business Partners and Investments.

Our clients increasingly aspire for donor advised funds to be used for impact, utilising both grant-making and investment as tools within their philanthropic toolkit. Your expertise is needed to help support our client facing teams serve these client needs.

As our charitable funds increase, you will monitor, actively manage and report on the ongoing allocation of Stewardship's assets and review returns, risk and monitor the performance of our investments. We want to be responsible stewards of our resources and have ambitions to achieve our mission through how we invest and engage responsibly.

Main responsibilities and duties include, but not limited to:

Investment Monitoring: Enhance and streamline existing investment management and monitoring processes to ensure optimal performance.

Investment Management: Work closely with the Donor Advised Fund and Philanthropy Fund teams to ensure accurate investment performance, reporting, and attribution, including calculations for loan interest and equity shareholding.

Treasury Management: Manage investments in alignment with Stewardship's liquidity, investment, and reserves policies to maintain financial stability.

Reporting: Collaborate with Financial Control and Finance Business Partners to ensure the timely and accurate delivery of management accounts, budgets, and annual reports.

Asset Manager and Banking Relationships: Oversee asset manager relationships, manage reports, address queries, and explore new investment opportunities.

Asset Allocation: Partner with the Investment Manager to determine the optimal asset allocation for Stewardship's balance sheet, balancing liquidity needs with investments in Kingdom causes and DAF account balances.

Stewardship: Promote responsible, sustainable and impact investing principles within and beyond Stewardship by engaging with investor networks and holding asset managers accountable.

Finance & Investment Committee: Assist in the preparation of documentation and papers for the Finance & Investment Committee and participate in quarterly meetings.

New Investments (based on experience): Undertaking investment analysis and financial modelling, assisting in the preparation and presentation investment opportunities to the Finance & Investment Committee.

It's all about you...

We recognise that to be great at your role, there are certain characteristics that are important and others that enable a good fit within our existing team and culture.

We know this is a broad role and whilst you might not meet all the specified criteria below, if you have a good level of fit and feel called to apply, we encourage you to do so. Alternatively, please get in touch for an informal conversation. Formal learning and development plans will be in place for this role.

- You will have investment experience within financial services.
- You are comfortable being both self-sufficient, taking your own initiative as well as being a team player and you enjoy working effectively as part of a hybrid team.
- You have strong verbal and written communication skills and can communicate clearly and effectively, flexing your style for your audience.
- You are highly organised and have strong IT skills and are familiar in working with the full suite of Microsoft Office applications.
- It would be advantageous if you have knowledge of responsible, sustainable and/or impact investments.
- It would be advantageous if you hold investment qualifications (e.g. CFA Investment Management Certificate or Impact Investing Certificate).
- You will be able to clearly demonstrate a personal commitment to the mission, principles, values, and practices contained in our Ethos Statement. You should also be able to demonstrate enthusiasm for the Christian purposes of the organisation and a readiness to support and contribute to its ethos.

Desired skills and experience

Skills and experience	Essential	Desirable
You will meet our Occupational Requirement to clearly demonstrate a personal commitment to the mission, principles, values and practices contained in our Ethos Statement.	✓	
You have the Right to Work in the UK (we do not offer sponsorship arrangements).	✓	
You will have investment experience within financial services.	✓	
Highly organised, able to plan and prioritise work, and ensure you commit to meet internal and external deadlines.	✓	
You are comfortable being both self-sufficient, taking your own initiative as well as being a team player and you enjoy working effectively as part of a hybrid team.	✓	
You are highly organised and have strong IT skills and are familiar in working with the full suite of Microsoft Office applications.	✓	
You will have experience preparing investment or asset allocation papers.		✓
Knowledge of responsible, sustainable and/or impact investments.		✓
Knowledge of Charity accounting.		✓
Investment qualifications (e.g. CFA Investment Management Certificate or Impact Investing Certificate).		✓

Working for us

Q. What are the usual working hours?

A. Stewardship's normal office hours are 9am to 5pm, Monday to Friday, but you may be required to work flexibly between 8am and 6pm in accordance with the needs of the organisation.

Q. How much Annual Leave do you offer?

A. All full-time employees receive 27 days Annual Leave, plus 8 days bank holiday leave.

Q. What are the pension arrangements?

A. Stewardship offers a generous pension contribution; the equivalent of 10% of your gross annual salary into a group personal pension scheme (applicable after 3 months service).

A salary sacrifice scheme for personal contributions is also available.

Q. Is it possible to work from home?

A. Yes, we offer flexible working for this role but would expect you to work in our London office for a minimum of 2 days each month, or as required by the organisation. You are expected in the office twice a week during the probationary period to help ensure a smooth transition and success in the role.

Q. What staff benefits do you offer?

A. Once probation has been passed, there are number of benefits available to staff:

- Subsidised exercise membership (up to £50 per month)
 - Hybrid and flexible working options
 - Contribution to your charitable giving account (matched giving up to £50 per month)
 - Generous leave allowances
 - Long service awards
 - Participation in the Cycle to Work Scheme
 - Death in Service benefit (4x annual salary)
 - Option to join a Health Cash Plan
 - Interest-free season ticket loan
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How to apply



Occupational Requirement (OR)

As a result of our Christian ethos, this post is covered by an Occupational Requirement (OR) under Part 1 of Schedule 9 to the Equality Act 2010. The successful applicant will be expected to be a practising Christian and to clearly demonstrate a personal commitment to the mission, principles, values and practices contained in our Ethos Statement, by:

- Active membership of local church congregation.
- An understanding of the faith aspects of the work of Christian charities, including the preparedness to pray with colleagues, where appropriate.



Contact us

For any questions or to arrange an informal conversation about this role, please contact Joan Gray, our People, Culture & Place Administrator, on:

Telephone: 020 8502 5600 extension 307

Email: careers@stewardship.org.uk



How to apply for this position

You can apply online for this role at www.stewardship.org.uk/about-us/careers

Please remember to also upload a copy of your C.V. outlining your employment history, education and relevant qualifications and experience. You are also welcome to submit a covering letter in support of your application.