



Job Description

Position:	Investment Manager
Reports to:	Director of Investment
Location:	Based remotely in the UK, or hybrid working from London office
Remuneration:	£48,000 - £52,000 with 3% employee / 8% employer pension contribution and other benefits
Duration:	Full time, Permanent

1 Overall purpose of the role

- To source, develop, and appraise new lending opportunities for AHF loan funds and delivery of partnership funds.
- To manage existing and new clients in the AHF portfolios, including high risk portfolio clients.

2 Specific Duties and Responsibilities

- Work with the Investment Team and other members of the AHF, drive pipeline and market development and source new lending business, spanning deals from £20,000 to £500,000+.
- Appraise applications – including both financial and impact analysis – conducting due diligence and presenting recommendations to the AHF's Credit Panels, and external partner Investment Committees when required.
- Convert investment offers into drawn investments, working with the Investment Officer and appointed solicitors to ensure timely completion of pre-drawdown conditions and any security conditions.
- Be responsible for the day-to-day management of the client portfolio, including collation of quarterly monitoring evidence as per the AHF's processes.
- Provide general advice and guidance to the AHF loan portfolio on the development and management of heritage assets for new uses, including signposting to specialist organisations. Support the delivery of the RePlan service as required.
- Ensure all records are kept up to date and accurate on the CRM system and AHF central records.
- Analyse client reporting and provide updates and risk assessment reports to the Director of Investment, recommending appropriate action where required.
- Regular travel across the UK to forge beneficial and enduring connections with other social investment and heritage sector organisations, funders, and advice providers, expanding the AHF's network.



- Support the Chief Executive and the Director of Investment to grow the AHF's funds for lending and to maximise income from existing sources, including establishing and maintaining constructive relationships with social investors, statutory and charitable funding bodies.
- In support of the above, take a lead on developing specific funding bids to increase the AHF's funds for lending and on the implementation of new programmes as required.
- Work with the Director of Investment to ensure all other staff members of the AHF play an active role in promoting and supporting AHF's lending programmes and provide social investment advice to the AHF's grant clients, ensuring effective working between grant and loan programmes.
- Contribute to the delivery of AHF's communications and social media strategy, including providing content for AHF publications and website and speaking at conferences and events
- Assist the Director of Investment to meet the reporting requirements of its funders.

3 Person specification

Essential

- Enthusiasm for social enterprise, heritage and the built environment.
- Experience of business development, assessment of investment proposals, and portfolio management with either a social investor or financial institution such as a commercial bank or similar, including building external relationships with partners and stakeholders.
- Experience of assessing and analysing business plans, annual reports and accounts, cashflow forecasts, and project plans, ensuring company processes are followed.
- An understanding of the general principles of lending, risk and risk mitigation, and traditional forms of security.
- Experience of client portfolio management with regular reporting analysis and risk assessment, including bad debt analysis and recovery.
- Highly numerate with effective written and oral communication.
- Excellent interpersonal, influencing, negotiating and communication skills.
- A team player with an ability to multitask, work flexibly, and willingness to learn new skills.
- Excellent attention to detail and able to prioritise effectively.
- Good IT skills.
- Able to travel across the UK.
- Good understanding of how Equality, Diversity and Inclusion contribute to an organisation's success.



Desirable

- Educated to degree level or equivalent.
- An understanding of property and associated contracts related legal issues and experience of liaising with legal firms.
- Working knowledge of social impact, including monitoring and evaluation.
- Experience of working within a charity or voluntary sector organisation.
- Has a full driving license.

We are a charity committed to being inclusive and giving everyone an equal chance to succeed – you can read more about our EDI commitments here: <https://ahfund.org.uk/about-us/commitments-edi> Applications are welcome from all regardless of age, sex, gender identity, disability, marriage or civil partnership, pregnancy and maternity, religion or belief, race, sexual orientation, transgender status or socio-economic background.