

Venovate Marketplace

Investor Manager

February 2014

About Venovate

Venovate is taking investing in the private market to the next level. We are building a new type of platform, making investing in alternative opportunities easier, safer, and smarter.

Alternative asset investing is one of the biggest emerging trends in financial services – representing a \$20 trillion market opportunity. Recent legislative changes, triggered by the JOBS Act, paved the way for Venovate to disrupt how money is raised and invested.

Our executive leadership team has extensive experience with building online stock trading services and is uniquely qualified to make investing in alternatives just as easy. Venovate is headquartered in San Francisco. We are looking for qualified and driven professionals to join us on our mission to lead the way to smarter alternatives.

About Venovate Marketplace

Venovate Marketplace, a registered broker-dealer with FINRA and member of SIPC, matches qualified institutional buyers and accredited investors with private placement investment opportunities to make raising capital easier than ever before. Our platform enables the discovery, evaluation, purchase, and settlement of private company stock, funds, and other alternative investments.

About the Job

Summary

As a member of the Venovate Marketplace team you will be responsible for managing the relationships with one of our core client groups: accredited investors. You will be the key point of contact for all investor related interactions, including investor onboarding, the review and approval process related to investor accreditation, and supporting investors in making investments in alternative opportunities on our platform. You take pride in delivering an outstanding experience to demanding clients, and you strive for above-average levels of client satisfaction.

This position reports to the President of Venovate Marketplace.

Duties & Responsibilities

- Monitoring and reviewing of new member onboarding on the platform
- Managing each investor account to ensure that the client has a completed profile, obtains a verified status of accreditation, and is introduced to the appropriate product specialists
- Providing regular business hours coverage to interact with clients via telephone and email
- Researching and responding to client inquiries and feedback posted on the platform

- Building trust with clients and effectively managing the ongoing Venovate Marketplace investor relationships
- Working with outside custodians, trust companies, and internal departments to effectively facilitate investment transactions
- Writing and reviewing of client-facing operational processes and procedures as needed
- Taking care of administrative duties (e.g. scanning, data entry, filing) related to client interactions

Personal Characteristics

- Strong general business acumen
- Professional, confident, and a very hands-on mentality
- Precise and diligent, with a keen eye for the details that matter
- Polished, articulate, and trustworthy demeanor and presentation
- Ability to work effectively within a dynamic and high-pressure environment, delivering results under tight deadlines
- Outstanding communication skills (both verbal and written), effective negotiation and interpersonal skills
- At home in a dynamic and expanding organization
- The highest ethical standards

Background & Experience

- Minimum of 5 years experience and a proven track record in private banking, working with (ultra) high net worth individuals and families, or related fields within financial services
- FINRA Series 7 and 63 - 79 is a plus
- Bachelor's degree in finance, economics, business administration, or related area
- CFA, CPA, J.D., MBA is a plus
- Solid understanding of alternative investments, like private equity, venture capital, hedge funds, infrastructure, natural resources, and real estate opportunities
- Fluency in Microsoft Office Suite (Word, PowerPoint, Excel), Salesforce (or similar) CRM

We offer

Venovate offers a competitive base salary, comprehensive benefits including health care, dental and vision, flexible savings account, 401(k) plan participation, generous vacation, equity based bonus and stock options commensurate with experience.