WHEB Asset Management UK Client Relationship Manager

September 2023

Pioneering impact investment firm WHEB seeks UK Client Relationship Manager.

WHEB Asset Management

WHEB is a pioneer in sustainable and impact investing. Our mission is ‘to advance sustainability and create prosperity through positive impact investments’. We do this through a single, long-only, global equity strategy, investing in companies that provide solutions to sustainability challenges. With a track record of over 15 years, we are one of the early innovators in listed equity impact investing.

Sustainability and impact investing define our whole business as well as the investment philosophy. As a Certified B Corporation, WHEB is part of a global movement of stakeholder businesses, which consider the impact of business decisions on our employees, clients, suppliers, the community, and the environment, as well as our shareholders. Our mission is supported by a strong culture and core values that guide our behaviour.

For more information about WHEB Asset Management see www.whebgroup.com

UK Client Relationship Manager role

WHEB is seeking a UK client relationship manager to join the team, based in London. WHEB works with a wide range of investors from across the spectrum including large institutional investors, wealth managers and intermediaries, as well as direct investors. We treat our clients as our partners, and this role will be at the forefront of creating strong relationships with both potential and existing clients.

This is a broad and dynamic role, with responsibilities including but not limited to:

- Primary point of contact for WHEB’s UK client relationships (institutional, intermediary and retail);
- Identifying new potential client relationships – structuring and managing sales pipeline;
- Review RFPs and questionnaires before submission;
- Consultant relationships;
- Hosting regular webinars and client events;
- Regular travel around the UK to visit clients;
- Arranging client/consultant meetings with the Investment Team;
- Managing platform relationships and partnerships.
The Successful Applicant

The successful applicant will have, as a minimum:

- Significant investment industry experience;
- Enthusiasm to travel regularly around the UK to meet clients and build networks;
- A passion for sustainable investment and positive impact;
- Knowledge of Salesforce CRM would be beneficial;
- A good proficiency in Powerpoint;
- Excellent people skills with a demonstrated focus on meeting the needs of clients; and
- Accuracy and attention to detail.

The successful applicant will also be able to demonstrate our values, in particular:

- Teamwork - work in a small, close-knit team, where debate and reasoned discussion are expected and rewarded;
- Leadership - demonstrate a driving and responsible attitude, working with a high degree of autonomy and ownership;
- Continuous Improvement – having a passion for progress and sharing learning;
- Passionate about Impact - a demonstrable understanding of – and passion for – sustainability;
- Integrity – honest in approach and treat all stakeholders fairly.

Equal opportunities and flexible working

WHEB is an equal opportunities employer and strongly encourages candidates from diverse backgrounds to apply. Based at our office in central London, the position will offer considerable opportunity for flexible working, including both office and home-based work, and we will consider part time working. For more information on WHEB’s policies and culture please see https://www.whebgroup.com/about-us/working-at-wheb/

Process

Applicants should send their CV and a covering letter (which is important as we want to understand what applicants would bring to this role and why it is right for them) to esther.muschamp@whebgroup.com

The deadline for applications is Friday 13th October 2023. We regret that it may not be possible to contact unsuccessful applicants.