

## **Investments Team Sales Support Specialist**

### **Introduction**

The Foss Investments Team Sales Support Specialist (“Support Specialist”) will report to the Senior Vice President of Investments and will be responsible for partnering with an investor relationship manager (Vice President of Investment) to handle the day-to-day investor demands, assisting the VP to deepen those relationships. In addition, the Support Specialist will be involved in or drive broad sales team beneficial projects and efforts under the direction of the Senior Vice President of Investments.

### **About the Job:**

This role will primarily involve partnering with a specific VP of Investments, supporting the business development through the following responsibilities:

- Utilize internal materials and resources to respond to investor requests
- Develop outreach plans stemming from client segmentation campaigns and/or from independent research
- Collaborate with Director of Marketing to craft marketing materials as needed for client presentations/pitches
- Assist with pre-conference, pre-event and pre-meeting planning and preparation
- Track and drive the timely resolution of action items established during investor meetings, working with both internal and external experts and information owners to do so. Record all such activity, relevant investor specific knowledge and opportunities (pipeline) in Salesforce for investors ‘owned’ by aligned VP of Investment
- Maintain investor progress reports to ensure the timely and accurate execution of all respective deliverables and to facilitate effective shared coverage
- Collaborate with aligned VP of Investments to plan and execute investor events.
- Participate in investor meetings to maintain awareness of needs of investors and effectively assist with managing deliverables

In addition to the above, the Support Specialist will partner with their direct manager – the Senior VP of Investments -- on projects that broadly benefit business development efforts, including support for event planning, CRM clean-up, marketing materials development, sales training efforts, etc.

### **About Foss & Company**

Foss & Company is a national investment management firm founded in 1983. We have managed and deployed nearly \$7 billion in Tax Equity on behalf of our institutional investor clients through direct investments, syndications, and proprietary Foss fund vehicles. Foss Renewable Energy Partners (FREP) is a wholly owned subsidiary of Foss & Company. FREP is significantly ramping its tax equity investment activity, and we are seeking individuals to join our ESG deal team in all aspects of underwriting, due diligence and negotiations, and post-close asset management.

### **A successful candidate will possess the following skills and attributes:**

- ◆ A minimum of 3 years of experience in a related support position

- ◆ BA/BS from accredited College/University
- ◆ Detail-oriented, ability to multi-task with great follow-up skills
- ◆ Polished, professional demeanor
- ◆ Handles confidential information with discretion
- ◆ Dynamic and proactive; comfortable in a fast-paced environment
- ◆ Excellent interpersonal skills and effective teamwork skills
- ◆ Strong project management, organizing, planning, and presentation skills
- ◆ Strong analytical skills
- ◆ Strong sense of ownership of projects and tasks
- ◆ Superior written and verbal communication skills
- ◆ Effective time management practices and problem-solving skills
- ◆ Proficiency in Microsoft Suite (Excel, Word, PowerPoint, and Outlook)
- ◆ Experience or ability to become proficient in Sales Force
- ◆ Securities Licensing

**Some benefits to look forward to:**

- Health and dental benefits
- Matching 401k
- Quarterly or annual bonuses

**Location:** This position will be based in the Central or Eastern Time Zones, may allow for remote working, but may require occasional in person presence depending on hiring location.

**Diversity:** Foss & Company is an equal opportunity employer and does not discriminate against otherwise qualified applicants on the basis of actual or perceived race, color, creed, religion, ancestry, citizenship status, age, sex, marital status, sexual orientation, national origin, disability or handicap, veteran status, or any other characteristic protected by applicable federal, state, or local laws. Foss & Company celebrates diversity, and encourages candidates of all backgrounds to apply.