



THE INVESTOR FORUM

Role Profile

Role Stewardship Analyst – Graduate programme

Reports to Senior Adviser

Overview

The Investor Forum is an expanding not-for-profit organisation that plays a critical role at the forefront of investor stewardship practice.

This is a one year training role, offering an excellent opportunity to gain a broad introductory understanding of the role of companies and investors by working at the heart of the investment industry. It is designed to appeal to candidates considering a career in portfolio management, sustainable investing, corporate governance, or as a company secretary.

The successful candidate would join the Investor Forum's experienced nine person team, and be involved in all aspects of their work.

Key Criteria

This opportunity is open to recent graduates from any discipline.

Successful candidates will be able to demonstrate an interest in business, stewardship and sustainability. They should be keen to develop their understanding of corporate governance, the role of investors, and the investment industry. Candidates need to be able to communicate effectively in writing and in person, work both independently and as part of a team, and to prioritise a wide variety of activities as described below.

Responsibilities

The candidate will provide general support to senior team members, which will involve preparation of presentations, drafting documents, and desk-based research.

Primary responsibilities will include, but not be limited to:

- **Engagements** - Supporting on the management of engagement activities, including record keeping and research.
- **Communications** – Drafting monthly Member newsletters, which will involve understanding the range of the Forum's work and following industry developments.
- **ESG project work** – Writing white papers on general stewardship issues, as part of three long-term projects.

Training

A bespoke training and development programme will be developed with the candidate, based on areas of interest.



Package

- 12-month training contract.
- £22,000 FTE salary, 10% benefits allowance and 25 days paid annual holiday.

Depending on the current environment, the role is likely to involve a mix of being based in our central-London office, and home working (laptop provided).

After one year, there may be the opportunity to join the team on a permanent basis and study for a relevant professional qualification.

How to Apply

- Deadline for applications: 30th October 2020
- Start date for successful candidate: 11th January 2021
- Please apply by eMail to: info@investorforum.org.uk

Please attach your CV and a covering letter explaining your interest in the role and describing the skills and experience that you would bring to the Investor Forum.

Following short-listing, interviews will be held via Zoom. As part of the second round assessment process, candidates will be asked to watch a webinar, then write a summary note and discuss the contents.

Investor Forum Background

The Investor Forum was set-up in late 2014 to help promote a longer-term approach to investing in UK companies and to provide a platform for collective engagement on strategic matters between investors and company boards. The business is a not-for-profit Community Interest Company (CIC).

To meet its objectives, the Forum focuses on three key activities:

- Collective Engagements - between institutional investors and individual companies, focusing on all material issues;
- Facilitating Dialogue – for example, company events with key investors, group meetings to discuss market issues, and expert speakers series; and
- Stewardship 360 Projects - selective projects to inform investors on ESG issues and well-functioning markets, and develop best practice in long-term investment and stewardship across the investment chain.

Our membership has expanded since launch to encompass ~50 investment organisations who invest in UK equities, including a wide range of global and boutique asset managers, and sovereign wealth, foundation and pension fund asset owners. Members pay an annual membership fee and are able to participate in Collective Engagements and other Investor Forum activities.

Investment 20/20 program

The Investor Forum is offering this role through the Investment20/20 platform. As part of the Investment20/20 program, you will have opportunities to meet and network with over 100 trainees across the industry and participate in technical training, socials and industry insight events.