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**Firstport for Social Entrepreneurs Ltd**

**Investment Associate – Role Description**

February 2025

**Job title:** Investment Associate

**Reporting to:** Head of Group Investment Programmes

**Salary:** £35,000

**Hours:**  Full time, 35 hours

**Based:** Home working, with access to our office in Edinburgh and occasional travel throughout Scotland

**Start date:** ASAP

**Contract:** Permanent

**About Firstport**

Firstport is part of the Firstport Group, Scotland’s leading agency for supporting social entrepreneurs, social enterprises, and purpose-led businesses. Encompassing Firstport for Social Entrepreneurs, Firstimpact and Firstfund, the group has over 16 years of experience helping thousands of entrepreneurs to develop, start, and grow their businesses.

Our group vision is a society in which doing business is synonymous with doing good. Deliberately ambitious, our vision describes the prospect of a society where all businesses operate to the benefit of their communities, in harmony with nature, and with respect for future generations.

* Firstport is the first port of call for individuals who have a social impact idea and want to make it their business.
* Firstimpact is an expert ally to projects and businesses that are serious about social impact.
* Firstfund provides sympathetic finance to ambitious social impact businesses.

We are committed to equality, diversity, and inclusion, and we aim to recruit and retain the best candidates from the widest pool of talent, one which reflects the communities we serve.

We strive to create an environment where everyone can be themselves and do their best work. We offer:

· A generous holiday package with 33 annual leave entitlement (including bank holidays). Office closure the days between Christmas and New Year in addition to annual leave entitlement.

· Pension scheme

· Flexible working

· An Employee Assistance Programme, which provides access to a range of support relating to work/life balance, physical, emotional, and mental health

· Bike-to-work scheme

Find out more about us on our website - www.firstport.org.uk

**Job description**

The Investment Associate will play a key role in the delivery of Firstport Group’s repayable investment programmes, working with ambitious social enterprises seeking investment to grow. Working closely with the Head of Group Investment Programmes and the Investment Manager, the Investment Associate will assist in the investment process from pipeline development through assessment to portfolio support.

The role holder will assist the Investment Manager in assessing applications to the investment funds across a range of financial, social, and strategic considerations, and present them to the Investment Committee for decision. They will also then support our portfolio of social enterprises who have received investment and manage the repayment process.

They will also be expected to assist in information management and reporting and support the ongoing improvement of the funds and the organisation.

**Key duties & responsibilities**

* Assess investment applications, including financial analysis, and prepare reports for Investment Committee decisions
* Assist draw down processes, including legal agreements
* Support portfolio management processes, including repayment
* Request and review investee financial and impact reports
* Assist in preparation of reports for board and stakeholders
* Provide organizational support to Investment Team
* Deputise for colleagues as needed
* Support Investment Team and other Firstport teams as needed
* Assist in pipeline development of new applicants and raising awareness of the fund
* Represent the team at external events and meetings

**Person specification - skills and key qualities**

We are looking for talented people from a wide range of backgrounds and communities. Whether through lived or gained experience, or both, you will understand and share a passion for what we do.

**Essential**

* Experience in supporting investments into SMEs, startups or social enterprises, OR experience in a finance role at a social enterprise
* Ability to understand, analyse and communicate complex financial information
* Strong written and presentation skills
* Excellent interpersonal and relationship building skills
* Digitally confident, open to using a range of tools (We use MS Office suite, Google suite, Slack, Trello, and Mural/Miro).
* Ability to work independently and adopt a problem-solving approach
* Strong organisational and prioritisation skills
* Able to manage competing demands and prioritize time effectively
* Attention to detail
* Flexible and autonomous
* Eligibility to work in the UK

**Desirable**

* Finance qualification and/or membership of relevant professional body (or part qualification)
* Experience/understanding of early-stage companies and/or social enterprises
* Experience of using Salesforce or other CRM
* UK driving licence