

# **Product Specialist**

## Investor Relations

**LOCATION: BOSTON**

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### **Main Purpose of the Role**

The Product Specialist works closely with the portfolio management and fund operations teams of a specific fund or series of fund teams to develop expertise across the offerings, inclusive of opportunistic, core, and value-add real estate strategies. S/he collaborates with the Investor Relations (IR) team running point on capital raising activities and frequently acting as a proxy for portfolio managers, to explain the investment philosophy, process, and performance of fund products to the current and prospective client base, either directly or in a supporting role. This role is also responsible for providing updates on overall financial market performance, economic trends, and how those play into the evolution of the strategy.

### **Responsibilities**

- Partnering with the investment and IR teams running the fundraising process, including pipeline monitoring, follow-through on capital raising activities and running recurring marketing meetings
- Partnering with the investment and IR teams to deliver content and answer questions for existing clients and potential investors
- Taking a highly proactive and collaborative approach to servicing the investment and fundraising teams, including through market intelligence – competitive funds, new product launches, fee structures, etc.
- Assisting with drafting portfolio-related correspondence
- Conducting investment reviews with clients, occasionally including on-site visits, which may require reporting on results, providing outlook, and preparing materials requested by the client or associated advisor
- Partner cross-functionally with Investment, Operations, Legal & Compliance, and Fundraising teams to support new product launches, enhance existing product offerings, and contribute to strategic structuring decisions and fee offerings
- Assisting Portfolio Managers in preparing quarterly investor letters, which include asset management updates, purchase/sale information, and relevant market insights assisting Investor Relations in creating and executing fundraising plans for relevant strategies
- Coordinating client reporting with respect to Company's strategic partnership relationships

## **AEW CAREER OPPORTUNITY**

### **Skills/Experience Required**

- Minimum of eight years' experience working with institutional private equity real estate funds (closed end and open-end) ideally within a product management or product specialist capacity
- Strong interpersonal skills including the ability to express complex material verbally in a concise and articulate manner
- Strong knowledge of the real estate and/or private equity asset class and strategies therein, coupled with a proven track record of managing real estate fund investor relationships
- Highly consultative and strategic approach; commitment to educating prospective investors and addressing needs of existing investors
- Tenacity, resourcefulness, and problem-solving skills with respect to AEW's business development efforts
- Focus on customer service and responsiveness when working with internal and external stakeholders
- Outstanding organizational skills with the ability to prioritize, meet deadlines, and manage multiple projects and relationships
- Ability to run a complete and efficient process, emphasizing accountability and communication
- Strong relationship-building skills, both externally and internally; ability to garner trust, confidence and respect from clients and colleagues
- Proactivity and drive
- Balance of robust technical product knowledge and strong relationship skills
- Highest integrity and ethics

### **Compensation**

- The base salary range for this position is \$175,000-\$200,000
- This position is eligible for AEW's annual, discretionary bonus plan
- AEW offers a full suite of comprehensive financial, medical and wellness benefits