

FIRM SUMMARY

Diversified Trust is an employee-owned comprehensive wealth management firm based in the Southeast with over \$10 billion of client assets under management. Our clients include individuals, multi-generational families, family offices, foundations, endowments and retirement plans. We provide tailored investment management, financial planning, trust and estate, family office, and institutional advisory services through our offices in Atlanta, Charleston, Greensboro, Memphis and Nashville.

POSITION

SVP of Private Markets

OFFICE

Atlanta

SUMMARY

Diversified Trust is a growing company, looking to add to our Atlanta Investment Team. We are seeking highly motivated, service-oriented, entrepreneurial-minded individuals to join us.

CONTACT

HR@diversifiedtrust.com

FOR MORE INFO ON DTC

diversifiedtrust.com
Please review our videos.

FLSA STATUS: EXEMPT

DISCLAIMER:

This position description is not intended, and should not be construed to be, an exhaustive list of all responsibilities, skills, efforts or working conditions associated with the job. It is intended, however, to be an accurate summary of those principal job elements essential for making decisions related to job performance, employee development and compensation. This position may be required to perform other duties and responsibilities as assigned.

Job Summary:

This position is responsible for supporting the management and strategic direction of the private markets program, including the private equity fund of funds and private real estate strategies with capital commitments of approximately \$900 million. The position will work closely with the Director of Private Markets and other senior members of the investment team. The Senior VP of Private Markets would also contribute to overall asset allocation recommendations, investment strategy research and implementation, ongoing due diligence of existing strategies and investment managers, researching new strategies for investment platform inclusion, and communicating investment strategies and performance within the firm as well as externally to clients.

Primary Duties and Responsibilities:

The primary responsibilities of the Senior VP of Private Markets position include, but are not limited to, the following:

- Source potential new manager relationships
- Screen inbound private markets investment opportunities for suitability on the investment platform
- Manage the due diligence process on both existing and prospective managers, focusing on private equity, venture capital and private real estate strategies
- Prepare investment recommendations for the Private Equity Investment Committee
- Monitor manager relationships through firsthand contact and review of written reports
- Function as an integral member of the investment team with responsibility for reporting to the team on market trends and key manager issues
- Analyze macroeconomic market trends and investment strategy opportunities with firm asset allocation policy
- Provide input and strategic vision for the evolution and further development of the private markets platform
- Travel occasionally for manager diligence and visits, as well as annual general partnership meetings
- Assist in producing quarterly client reports for the private equity fund of funds
- Support fundraising efforts for the private equity fund of funds, including development of client marketing materials and origination of legal documents in conjunction with external counsel to produce legal documents

Skills/Competencies necessary for this job include:

- Bachelor's degree in business or related field; advanced degree in finance a plus
 - CFA designation or intent to progress towards the designation preferred
 - 10+ years of experience as an allocator, with primary experience in private equity investments
 - Experience with investment manager due diligence and portfolio construction
 - Excellent writing and communication skills
 - Experience with financial / investment technology platforms; proficiency in Excel and PowerPoint applications
 - Ethical practitioner with ability to exercise sound judgment and effectively manage risk
 - Strong analytical and problem-solving skills
- Strong work ethic with a motivated and driven ownership mentality

Position is 3 days onsite / 2 days remote

If this job seems like a good fit, please email your resume to HR@diversifiedtrust.com