

Managing Director, Americas (AMRS) Job Profile

CAIA Association is a global professional body of 14K members in more than 100 countries that aims to build the most energized community of investment professionals around the globe. The organization provides unbiased insight on a broad range of investment strategies and industry issues, key among them being efforts to bring greater diversification to portfolio construction decisions to achieve better long-term investor outcomes.

Our activities are largely broken down into two main segments, credentialing and thought leadership. Our credentialing programs are designed to raise the investment acumen and ethical standards of the industry on behalf of clients. We offer the prestigious Chartered Alternative Investment Analyst program, a global professional designation, requiring two levels of rigorous preparation and high stakes examinations. For those working within the wealth management value chain or in supporting functions, we also offer an online educational platform called UniFi that is intended to provide self-paced, introductory understanding and conversational grasp of the spectrum of alternative investment asset classes and portfolio construction.

Our thought leadership development aims to raise our brand profile, resulting in greater influence of our programs, ethical values, and expertise and cultivating a profession that is better trained and more aligned. Our range of content mediums cover the full range of delivery preferences including long form white papers, a curated technical journal, webinars, live events, podcasts and an enterprise blog.

The role of the Managing Director, Americas is to advance CAIA Association's mission throughout the AMRS region (Canada, US, LatAm) through the overall guidance, coordination, support and leadership of organizational resources and staff. This position is responsible for delivering measurable value and building mutually beneficial relationships with CAIA stakeholders---members, candidates, investment professionals, academic leaders, like-minded associations, and regulators and policy makers. Specifically, this is done by leading a team to raise awareness of CAIA programs; speaking publicly and boldly through industry events and media outlets; creating local opportunities for continuing education and community formation for CAIA members; advocating for high ethical standards and regulatory evolution in the investment profession; and supporting the work of local member chapters and volunteers. Key accountabilities and deliverables of the position include the responsibility for defining the focus, priorities, and delivery of the strategic plan (Vision 2035) in the region; driving candidate numbers across our programs; building brand awareness and affinity for the organization; and having primary budget responsibility for all expenses in the region. The role is a key member of the global Leadership Team (LT)

Essential Functions

General Management/Organizational Leadership:

- Participate as an active and engaged member of the global Leadership Team
- Serve as the primary face and voice of CAIA Association in the region

- Take ownership for the business as primary budget holder for the region and express a voice in setting functional priorities
- Accountable for initiating, setting and monitoring regional activities including creating and implementing a multi-year, multi-dimensional business plan aligned to Vision 2035
- Responsible for setting and executing regional goals around educational program units, enterprise sales, and sponsorships.
- Cultivate strong regional coordination with EMEA and APAC while allowing for variation and localization
- Facilitate a spirit of collaboration and partnership with global functional leaders in ensuring successful deliverables are aligned and consistent across regions

External Representation/Advocacy:

- Deepen employer B2B outreach to solidify understanding and acceptance of educational programming, thought leadership and a fiduciary mindset
- Responsible for identifying media and editorial opportunities to increase awareness of CAIA Association based on regional/local priority markets.
- Carry the CAIA Brand and key messages to high profile industry and educational conferences, chapter events, and other public stages
- Assure CAIA Association is strategically positioned to advance awareness of the organization, including its brand, messages, and identity to all key areas of coordinated outreach in the region.
- Promote CAIA's content themes and mission with key influencers such as senior asset owners, asset managers, regulators, policymakers and academics
- Cultivate key academic and association partners to extend market impact
- Design and oversee periodic convening events for LPs, GPs and C-suite leaders
- Curate panels and keynote speakers for Alts conference series and chapter events

Mission and Service Orientation:

- Exercise impeccable judgment on complex, and at times ambiguous operating, policy, and strategic issues while maintaining a deep respect for the integrity and sustainability of the investment profession in AMRS.
- Possess the self-confidence, crisis management skills, fortitude and patience to deal with high-profile, sometimes contentious situations, intervening credibly and effectively in times of uncertainty.
- Where appropriate, take a bolder stance on issues of professional standards, practice, and ethical concerns.
- Lead and participate in the ongoing health of AMRS' financial markets.
- Tirelessly promote, support, and serve the well-being of the CAIA Association community

Critical Executive Leadership Skills

Strong industry experience - Must understand the capital markets and asset management business and how it impacts finance and economics.

Leadership and Strategic Vision - Visionary leader; must have demonstrated success devising and executing strategy and complex business plans.

Team Player: Ability to motivate, inspire and develop regional team. Skilled at delegating responsibilities and empowering staff. Strong communication, collaboration, and conflict resolution capabilities.

Large-scale Global Operations Experience - Must have a track record grounded in effective execution and operational excellence in global business environments.

Global Expertise and Mindset - Must act with a global mindset to navigate and lead across diverse cultural markets; must successfully collaborate to leverage resources and ideas across all geographies

Diversity of Thinking and Management Styles - Must respect diversity and consider varied perspectives, professional backgrounds of others, and approaches employees bring to the workplace

Ability to Drive Change/Transformational Leadership - Initiate and lead complex organizational change as well as respond effectively to external forces

Stakeholder/Customer Focus and Impact - Must demonstrate a strong stakeholder focus externally as well as a strong Client/Staff focus internally

Integrative Thinking - Must demonstrate the ability to constructively face and balance tensions during decision-making process thus generating creative solutions.

Education and Experience

- Extensive (10+ years) relevant business and leadership experience in the investment management and/or broader financial services industry
- 10+ years leadership and management experience leading global, complex and matrixed teams required.
- Graduate degree from business school/university degree or CAIA/CFA preferred.
- Large-scale global operations and global business experience
- Business and commercial development experience in a global environment preferred.
- Proven ability to develop effective relationships with key stakeholders: chapters, members and industry leaders
- Fluency in English required; multi-lingual capability would be useful
- Excellent communication skills including written, verbal, listening, and presentation
- Highly effective influencing skills; able to persuade without authority
- Willingness and ability to handle rigorous global travel schedule of 35-50%

Year 1 Performance Objectives

- Research, socialize and gain approval for a multi-year AMRS business plan consistent with Vision 2035 that delineates priorities and forecasts in the US, Canada and LatAm.
- Design private capital engagement plan that accelerates brand awareness and educational programming take-up across PE/PC/RE/Infra GPs in North America
- Structure and gain approval for an enterprise B2B plan that includes key accounts and creative approaches to transact for educational programming and sponsorships.
- Devise plans to better deliver impactful improvements through chapters in order to substantially approve lapsed member challenges
- Be recognized as the voice of CAIA within the region amongst colleagues, media, members, and the larger industry

Position can be located anywhere in the AMRS region and will report to the CEO, John Bowman.

DM John at LinkedIn or email him at jbowman@caia.org if you're interested.