



Manager, Client Relations (San Francisco)

New Forests (www.newforests.com.au) seeks a qualified candidate for the position of Manager, Client Relations. The Manager, Client Relations will be responsible for servicing New Forests' institutional clients who have invested in our US strategy. This role will support all aspects of client relationship management for those investors. The US office is based in San Francisco, which is the desired location for this role, however candidates seeking to work remotely will be considered.

New Forests is a real assets investment manager offering leading edge strategies in forestry, land management, and conservation. Our business mission is to manage sustainable landscapes for production and conservation and to generate shared value for our clients and the communities where we operate. Founded in 2005, we offer institutional investors dedicated investment strategies in the United States, Australia-New Zealand, and Southeast Asia and have USD 5.6 billion in assets under management. We manage sustainable timber plantations, natural forests, forest carbon projects, rural land, and processing infrastructure. New Forests has a track record of excellent returns and has a pool of long-term, blue-chip institutional clients from around the world. New Forests is headquartered in Sydney with offices in San Francisco and Singapore.

The Manager, Client Relations will report to the Global Head, Investor Relations (based in Sydney) and will be a member of the New Forests' investor relations team. The investor relations team oversees funds marketing and capital raising, as well as client relations and reporting for New Forests. The team operates in a fast-paced environment with a strong focus on high quality, long-term and transparent investor relationships.

This role will be primarily responsible for servicing clients across New Forests' investment products in the United States by implementing and coordinating all aspects of client relations in the areas of quarterly and annual reporting, annual meetings, field tours, and managing responses to client queries. The Manager, Client Relations will work closely with New Forests' investor relations team, funds management team, and finance team in the delivery of client support services. The Manager, Client Relations will work with the rest of the investor relations team in supporting a core of high-quality institutional clients with timely, thoughtful, and accurate information regarding their assets and New Forests' services.

The Manager, Client Relations will be primarily responsible for the following functions:

- **Coordination, management, and distribution of quarterly and annual reports**—Coordinate closely with the finance team, funds management teams, compliance officer, and the US Managing Director to produce and distribute quarterly reports, side letter reports, and other special reports to clients. Involves close proofreading, editing and some report writing, as well as coordinating responses to any follow up questions from clients.
- **Management of annual investor meetings**—In conjunction with relevant individuals and teams, coordinate annual meetings and investor tours in the United States. Manage process related to and contribute to production of annual meetings content, presentations, delivery, and meeting logistics. This involves preparing the annual meeting presentations based on the narrative put forward by each investment strategy team, working closely with the investor relations team on the approach and messaging.
- **Support management of client issues**— Coordinate and provide timely and thoughtful responses to ad hoc investor queries related to accounting, financial analysis, and asset management, coordinating with finance team and portfolio managers as appropriate. This involves working closely with both the investor relations team as well as the finance team to best manage client relationships across all US investment vehicles.
- **Develop efficiencies and improvements in client services and reporting**—Work with finance and portfolio management teams to continuously improve internal information management systems to deliver high quality client reporting.
- Establish, engage with, and maintain key relationships with New Forests' clients invested in our US strategy to support a high quality, service-oriented investor relations program
- Work closely with investor relations team and funds management teams to ensure the US client servicing program delivers on New Forests' business plan
- Some travel within the United States and internationally as required

We are looking for candidates with the following qualifications:

- Excellent project management capability. Excellent organisational skills related to time management and project management are essential to this role.
- 3-5 years of experience in client relationship management. We have a preference for candidates who have experience working with institutional investors. Experience working in alternative assets (e.g. timber, agriculture, infrastructure, real estate, private equity) and/or impact investing and sustainability would be beneficial.
- Demonstrated capacity for maturity and confidence in managing institutional investor and business relationships in the financial services sector.
- Excellent writing and editing skills. Must be able to conceptualise and understand how to communicate complex information to investors through presentations, reports, briefing notes, and other media, and be able to work with other people in New Forests to develop high-quality materials in a timely manner.



- A demonstrated and knowledgeable interest in sustainability and responsible investment.
- Must be a team player and work well under pressure and deadlines.
- Minimum Bachelor's degree in business, economics, finance, liberal arts, or equivalent preferred.
- A high degree of proficiency in Microsoft Office (Word, Powerpoint, and Excel).

To apply, please provide your resume and cover letter, explaining your interest and qualifications for the position, in PDF format, to careers@newforests.com.au.

Phone calls will not be accepted.

New Forests is an Equal Opportunity Employer that values diversity and inclusion. We offer flexible working arrangements to all employees to support their work/life balance. We are also a Certified B Corp.

