

Investor Relations Associate

Crystal View Capital/Osprey Management is a private equity real estate firm known for its vertical integration that specializes in the acquisition and management of value-add manufactured housing and self-storage assets. Since its inception in 2014, the Firm has raised over \$200 million in equity capital and currently has over \$500 million in assets under management. Our in-house management company is a leader in asset management, we have a tremendous amount of knowledge blending property management and service provisions to simplify everyday life. Our team encompasses vision, talent, harmony, beliefs, and commitment. We have over 40 professionals in the corporate office dedicated to the in-house management of our 85+ assets. The in-house asset management team also employs over 150 property level staff members at its property locations. Apply today to join one of the Nation's most prolific real estate asset management firms.

We are seeking a disciplined and resourceful Investor Relations Associate to manage, execute, and grow the firm's current and future investor relations initiatives. The desired candidate will be an experienced, results-oriented professional with the desire to work as a part of a dynamic, fast-paced team. The candidate will interact closely with current and prospective fund investors, while working collaboratively with acquisitions, operations, and marketing management team members. In this role, you will build and maintain relationships with our investors, being the friendly go-to person when they need assistance, whether that is updating their personal information or are looking to schedule a portfolio review call with our IR team. You will play a key role in ensuring our investor portal, reporting webpage and CRM are up to date, by regularly auditing information, uploading statements and documents, and maintaining the appropriate documentation to comply with all regulatory requirements. Your attention to detail and organizational skills will play a critical role in ensuring a positive experience for our current and prospective investors.

INVESTOR RELATIONS ASSOCIATE BENEFITS:

- Starting Salary of \$45,000-\$50,000
- Full-Time
- Generous Monthly Bonus Opportunities
- Medical benefits in the amount of \$500 per month
- Dental, Vision and other supplementary benefits available
- Holiday Pay
- Paid Time Off (PTO)
- Exposure to senior and executive leadership
- Collaborative and supportive team environment
- Work/Home Life Balance

INVESTOR RELATIONS ASSOCIATE RESPONSIBILITIES:

- Build and maintain strong relationships with our investors by providing first-line support for questions and updates, from the onboarding process, and throughout the life of their investment.
- Manage the funds' IR function, tracking investor interactions, inquiries, leads, and follow-ups, managing the pipeline of current and prospective LPs
- Maintain accurate and up-to-date records and investor information in Appfolio, including updating personal information, distribution preferences and key documentation to ensure accuracy and compliance with internal policies and procedures.
- Coordinate the distribution and upload of documents to investors, including statements, tax documents, quarterly financials and asset updates.
- Assist our Investments and Finance teams with various tasks to support year-end tax preparation, including tracking composite withholdings, and assisting with our semi-annual fund audit.
- Manage communication materials to existing investors
- Facilitate investor meetings, developing pre-meeting briefs and executing post-meeting follow-ups
- Own the coordination and preparation of investor reports, presentations and communications, including quarterly and annual reports, call presentations, case studies, meeting presentations, and ad-hoc reports
- Assist in the preparation of due diligence materials for prospective investors, including pitch decks, offering memoranda, and financial analyses
- Plan and execute investor events

- Additional responsibilities as directed for the success of the team and the Company.

INVESTOR RELATIONS ASSOCIATE QUALIFICATIONS:

- Bachelor's degree in finance, Business Administration, Economics or a related field. MBA is a plus
- 2-4 years of experience in investor relations, client services or a related function within the financial services industry, preferably with exposure to private equity, private credit or alternative investments
- Preference for working knowledge of the real assets sector
- Comfortable with core Microsoft Office tools and technology tools in general (Mail Merge, MS Word, Outlook, etc.).
- Experience with Appfolio and Monday.com a plus.
- Professional and friendly demeanor, with excellent communication skills, both written and verbal.
- Excellent organizational skills and attention to detail, with the ability to manage multiple priorities and deadlines in a fast-paced environment
- Strong attention to detail and follow up skills.
- Strong problem solving skills.
- Proven organizational skills, and ability to handle a large volume of competing priorities.
- Willingness and capability to take ownership of products/deliverables

At Crystal View Capital, our key operating principles allow us to create a culture that differentiates us from any other organization. Our team executes our one-firm approach from corporate to individual properties, collaborating as one to achieve results. Our reputation is paramount, our word is our bond, and we take each experience as an opportunity to better ourselves, our company and deliver for our stakeholders. We align ourselves with our stakeholders by creating a meritocracy; setting ambitious goals and standards that are rewarded upon success.