ARK INVEST

INNOVATION IS KEY TO GROWTH

October 8, 2020

ARK Investment Management Is Hiring:

Client Portfolio Specialist

Who We Are:

ARK is a global investment manager focused solely on investing in disruptive innovation that is changing the way the world works. Majority Owner, Catherine D. Wood, founded ARK in 2014 on the belief that innovation is key to growth. Rooted in over 40 years of experience, ARK aims to identify large-scale investment opportunities in the public markets resulting from technological innovations centered around genome sequencing, robotics, artificial intelligence, energy storage, and blockchain technology.

ARK manages and sub advises long-only global public equity portfolios across a variety of investment vehicles, including a suite of exchange traded funds (ETFs), mutual funds, and separately managed accounts. Our investments are backed by an open research ecosystem designed to identify innovations with the potential for long-term growth.

As of September 30, 2020, the firm managed approximately $29.8 billion assets.

ARK is committed to ensuring equal employment opportunities for all employees and strives to maintain an environment free of discrimination based on race, color, religion, gender, national origin, ancestry, age, disability, genetic information, military or veteran status, marital status, sexual orientation, gender identity, citizenship, or any other protected category or characteristics as defined by federal, state or local laws. If you want to learn more, visit our "Philosophy" page to understand how ARK differs from traditional investment firms. We also encourage you to meet the ARK team and follow us on twitter.

What You Will Do:

We expect you to partner with our CPM and provide support for the CIO/PM and investment team in managing relationships with distribution partners and existing/prospective clients. Further, you will perform the following duties / responsibilities:

- Act as primary point of contact for inbound due diligence inquiries from prospects throughout the sales process, including:
  - Intake initial requests for calls and meetings with prospective clients to support sales effort
  - Log inquiries and collaborate with CPM for further instructions;
  - Liaise with the relevant analysts and Compliance Manager to craft specific investment-related responses;
  - Project-manage the firm's investment related responses to investor RFP and DDQ requests; and
  - Provide product information and sales support to investors utilizing pre-approved templates/commentaries.

- Portfolio analysis and research:
    - Compile monthly, quarterly, and annual portfolio and stock commentary reports for distribution partners;
    - Attend weekly stock meetings to document and summarize portfolio changes;
    - Communicate portfolio changes to distribution partners during regular scheduled update calls; and
    - Run and maintain portfolio analytics and attribution reports.
- Manage conference and prospect meeting activity including:
    - Set up sales meetings and coordinate conference attendance;
    - Manage, revise and implement the business development prospect follow-up protocol;
    - Ensure the calendars of the CPM function and other relevant frontline staff are up-to-date for sales meetings and conferences; and
    - Coordinate with multiple distribution partners all aspects of sales process included but limited to road show and in person meeting preparations, meeting presentations, touchpoint activity, and territory assignments.
- Strategic activity:
    - Research new opportunities and channel development as assigned;
    - Build and maintain a roster of competitors;
    - Proactively support broader corporate initiatives and participate in special projects and other duties as assigned; and
    - Lead the firm's conference sponsorship and attendance strategy. Complete and coordinate with distribution partners any follow up activity.

Who You Are:

- You have 7+ years industry experience required; equity or asset management experience preferred
- You have a Bachelor's degree from an accredited university
- You have experience in managing relationships with high net worth and institutional clients
- You have excellent communication and presentation skills (written, visual and physical)
- You possess strong analytical and problem-solving skills
- It's a plus if you have manager selection / due diligence or product specialist experience

There is much more to share, so if you feel excited after reading the above, please email your resume and a brief cover letter to James Chavis (JChavis@ark-invest.com)