



POSITION

Head of Strategy & Business Development

Austin, TX Headquarters

SUMMARY

The Head of Strategy & Business Development (“**Head of Strategy**”) will be part of the leadership team responsible for establishing and executing on the Firm’s strategic vision, including but not limited to, investment strategy development, investment vehicle structuring, fundraising, business development, investor relations, and other investor facing activities for The Palisades Group (“**Palisades**” or the “**Firm**”). The position requires extensive experience with all aspects of marketing, institutional fundraising, and investor communications. The ideal candidate will have a network of institutional investors and a strong track record of fundraising preferably in the private credit, structured products and/or real estate sector.

The Head of Strategy will help design and execute on a variety of fundraising strategies related to the Firm’s investment business. The position will also be responsible for creating a robust investor relations framework aimed at providing transparency and strong connectivity with existing investors as well as expanding the Firm’s investor base. The individual will be responsible for gathering market intelligence from institutional allocators and identifying opportunities to create bespoke investment vehicles in separately managed account form or co-investment vehicles.

The individual in this role will interact and collaborate with various teams across the Firm, including Investments, Risk Management, Finance & Accounting, and Legal & Compliance to gain an exceptional understanding of Firm strategies and capabilities.

Excellent written and verbal communication and interpersonal skills are critical, and exemplary representation of the Firm to all external parties will be a key component of the role.

PALISADES

Palisades is an alternative asset manager in the global residential credit markets with experience managing over \$18.4 billion of loans and real estate since 2012. The Firm invests in and actively manages a diverse portfolio of residential loans, real estate, and fixed income assets with a notional balance of approximately \$5.3 billion with underlying properties located in the United States, Europe, and Latin America.

ESSENTIAL DUTIES

- Responsible for the Firm's investor relations program, such as fund LPAC meetings, quarterly and annual investor reporting
- Proactively expand the firm's network of global investor relationships, with a constant focus on deepening existing investor relationships as well as identifying and cultivating prospective new investor relationships
- Promote the continual articulation of the Firm's unique team, strategies, performance, and impact
- Attend key investor conferences and networking events
- Be an articulate spokesperson for the Firm, exemplifying its values and vision
- Design, execute and lead a robust marketing, fundraising and investor relations strategy
- Support the strategizing, planning, and execution of fund offerings, including market analysis, preparation of marketing materials (including VDR, pitch decks, PPM, DDQ, etc.)
- Gather market intelligence data from the allocator community to develop ideas to tailor investment vehicle structures, strategies, risk tolerances, return targets, and other key metrics
- Develop and maintain strategies that align with Palisades' commitment as a PRI signatory and drive the Firm's ESG initiatives
- Seek out and respond to allocator RFPs
- Collaborate with third-party placement agents
- Ensure strict adherence to compliance matters (e.g. general solicitation, marketing materials, etc...)
- Establish key performance indicators and be accountable for execution

MINIMUM REQUIREMENTS

- Education: Bachelor's degree in Finance, Accounting, Business, or Communications preferred
- MBA, CFA or CAIA highly preferred
- 7+ years' experience in investor- or client-facing roles, and a strong track record of creating positive relations with the investor community
- Ability to effectively participate on (or lead) work teams, and serve as an agent of change
- Strong communication (written and verbal), interpersonal, and leadership skills
- Strong understanding of SEC laws and securities disclosure requirements, specifically relating to external marketing regulations and compliance
- Deep knowledge and understanding of the capital markets, as well as a thorough understanding of key metrics for real estate assets
- Intimately familiar with financial modeling techniques and valuation methods used by investment teams
- A strong understanding of macroeconomics, capital markets trends, competitor activities, and industry dynamics
- Demonstrated ability to interact with all levels of management, line of business personnel, and current and prospective investors
- Proficiency in Word, Excel, PowerPoint, Salesforce or other CRM

- High level of organization, attention to detail, ability to prioritize, and flexibility with respect to changing priorities and deadlines
- Strong understanding of best practices in investment management industry

BENEFITS

- Medical, dental and vision insurance
- 401(k) retirement plan matching
- Charitable giving employee matching program
- Continuing education and professional certification expense reimbursement
- Wellness stipend (monthly)
- 13 paid holidays
- Remote work option (Fridays)
- Summer hours on Friday
- Friday team lunches

Palisades is committed to maintaining a positive and collaborative work environment that is safe and respectful of others; our shared success depends on it. Accordingly, we do not tolerate workplace discrimination, violence or harassment.

We are proud to create a diverse environment and are proud to be an equal opportunity employer.

Interested and qualified candidates should send resumes to Jack.Macdowell@palisades.us.com for consideration. Please include the position you are applying for in the subject line of the e-mail.