



Copia Investment Specialist

Department: Copia Capital Management
Reports to: Copia Managing Director
Main Location: Copia Capital Office, London (Remotely based)

About Novia

Novia Financial is an award-winning financial technology company based in the heart of Bath, just a 5-minute walk from the train and bus stations. We launched to market in October 2008 to provide a comprehensive wealth management service or 'full wrap platform' for Financial Advisers and their clients. Novia provides a transparent pricing structure as well as access to a wide range of product wrappers, an all-encompassing suite of portfolio management tools, and access to an extensive range of investments. For more information about us, please visit <https://www.novia-financial.co.uk/>

Copia Capital Management provides a Discretionary Fund Management service available via both the Novia Financial platform and other wrap platforms for custody and administration in the UK, and via the Novia Global platform internationally. Set up by Novia Financial in 2013 as a trading style, Copia offers a range of portfolios with different objectives to address different client needs. The core investment approach uses proprietary quantitative algorithms as an asset allocation and risk management tool.

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Job Summary/Purpose

The role holder will assist the Copia Team by attending meetings with adviser firms to support Copia colleagues and the Novia Regional Sales Managers (RSMs) and Account Managers (AMs) with explaining Copia's investment process and capabilities, as well as its standard and custom portfolio propositions and Copia Research Services. There is scope within the role to drive own sales where applicable.

Specialist Skills, Qualifications and Experience

Essential:

- > A minimum of seven years' experience in the financial services industry. Knowledge of multi-asset investing, and fund platforms is advantageous.
- > Good academic record, with a degree qualification or equivalent in Finance, Economics, Investment or Financial Mathematics or equivalent. Investment management qualifications are desirable such as Bloomberg Market Concepts, IMC, CFA or similar.
- > Proficiency in Microsoft Office (including Word, Excel and PowerPoint).
- > Excellent numeracy skills and attention to detail.
- > Good understanding of Capital Markets, Exchange Traded Funds, portfolio theory and ESG investing.
- > Good understanding of marketing strategy and techniques.
- > Strong work ethic and be challenged in a fast-paced, highly intellectual team environment.
- > Creative and resourceful approach to problem-solving.
- > Detail-orientated with a commitment to producing work of superb quality, often under tight deadlines.
- > Excellent organisational skills and ability to work on multiple tasks at the same time, whilst paying attention to detail.

Key Responsibilities:

- > To support/drive RSMs and AMs who have introduced Copia to adviser firms with the ability to explain in detail Copia's toolkit for designing, building and managing custom model portfolios.
- > To support/drive RSMs and AMs who have introduced Copia to adviser firms with the ability to explain in detail Copia's investment philosophy, process and performance of its standard model portfolios, for example, Copia Select, Copia Volatility Focus and Copia Retirement Income.
- > To support/drive RSMs and AMs who have introduced Copia to adviser firms with the ability to explain in detail Copia's investment, philosophy, process and performance of its Research Services.
- > Assist the Copia Managing Director, Senior Portfolio Manager, Portfolio Manager and Portfolio Manager Associates with the analysis of existing adviser model portfolios, presentation of findings to advisers and the preliminary scoping of Custom model portfolios and scoping for Research Services. This

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includes scheduling and conducting meetings, webinars and conference calls to talk through findings whilst following the agreed Copia sales process.

- > To maintain up to date records of interactions with adviser firms, via Salesforce and other systems (if appropriate).
- > To be familiar with recently published content and materials published by Copia and to flag and discuss it with advisers and prospects where relevant.
- > Support any sales and marketing materials and campaigns in conjunction with department heads.

You will, from time to time, be required to undertake other activities that fall within your capabilities as directed by management.

Core Competencies:

Business Focus - The motivation and ability to apply good financial practice and company procedures at all times.

Operational Excellence - Continually delivering and improving excellence for clients and customers.

Client and Customer Focus - Add value to client/customer, adhere to Treating Customers Fairly principles, and operate as a true business partner.

Communication - Communicate clearly and concisely, tailoring content and style, with ability to make a positive impression on others.

Expert Knowledge - Consistent application of professional or specialist knowledge and skills; takes opportunities to contribute to policy and best practice.

Working with Others - Working successfully with others and building a network of good relationships to achieve shared goals.

Performance Focus - Demonstrate energy and enthusiasm, takes ownership, delivers results and improves personal performance.

Working at Novia Financial

Some of the benefits of working at Novia Financial:

- > Competitive salary.
- > Annual discretionary bonus scheme.
- > Flexible working requests considered.
- > 25 days holiday entitlement plus bank holidays, with the option to purchase or sell up to 5 additional days per year.
- > Tech Scheme (buy discounted electrical products and pay back monthly via Company payroll).
- > Cycle to Work scheme.
- > Supported and encouraged professional development.
- > Regular social events.
- > Flexible dress code in the office.
- > Private medical scheme.
- > Income protection scheme.
- > Group contributory pension scheme.
- > Internal mentoring scheme.
- > Employee Assistance Programme (EAP).
- > Interest free season ticket loans for travel costs.
- > Various corporate gym membership rates.
- > Novia Foundation Day in support of charitable activities.

To apply for this role, please email an up-to-date CV to jobs@novia-financial.co.uk