



Copia - Business Associate

Department: Copia Capital Management
Reports to: Copia Managing Director
Main Location: Copia Capital Office, London

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 Managing Director with strategy development, competitor analysis, analysis of changes in the Discretionary Fund Management (DFM) sector, financial planning, sales, marketing, operational, IT, contract management and risk and compliance management.

Specialist Skills, Qualifications and Experience

- > Knowledge of multi-asset investing and fund platforms is advantageous.
- > Strong academic record – degree qualification or equivalent, in Finance, Economics, Investments or Marketing, or an equivalent discipline.
- > Proficiency in Microsoft Office products, including Word, Excel and PowerPoint.
- > Excellent numeracy skills and attention to detail.
- > Good understanding of marketing strategy and techniques.

Personal Attributes

- > Strong work ethic, eager to learn 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 a high 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

- > Support the Copia Managing Director in the following areas:
 - Developing various strategy plans – both in the short and medium terms;
 - Development of reports on competitor analysis;
 - Tracking developments within the DFM sector – both business developments (tracking M&A activity, new entrants, fund flows, personnel changes) and product flows (any new product launches);
 - Preparing presentations and briefing notes;
 - The financial planning process. This includes liaison with Finance and preparing weekly and monthly reports and an annual report.
- > Help maintain effective task lists as regards to on-going projects with Sales, Marketing, Operations, Risk and financial planning.

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- > Work closely with both the Copia and Novia Sales Teams, Marketing, Risk & Compliance and IT Teams on any relevant matters, as well as answering any queries relating to sales, marketing, operational, risk and compliance and financial planning, either from internal or external sources.
- > Establish key relationships with both internal and external sources in respect of all sales and marketing matters. Ensure, with support from the Copia Managing Director, timely execution of all sales and marketing matters.
- > Act as day-to-day support to external marketing consultants as Copia develops a new visual identity, new 'brochure', launches a new website and enhances the weekly 'Expresso' and monthly market commentary.
- > Assist with the development of sales and marketing materials to support the Sales Teams and related marketing campaigns, ensuring appropriate document version controls are in place.
- > Support any sales and marketing meetings, campaigns and webinars.
- > Maintain the Company's CRM tool to capture and cleanse existing data to help with the tool's lead generation capabilities.
- > Where explicitly authorised and delegated, manage Copia's social media accounts for the promotion of Copia's marketing content in accordance with all relevant sign-off procedures and applicable Social Media Policy.
- > Establish key relationships with both internal and external sources in respect to any operational matters. Ensure, with support from the Copia Managing Director, timely execution of all operational matters.
- > Establish key relationships with both internal and external sources in respect to any IT matters. Ensure, with support from the Copia Managing Director, timely execution of all IT matters.
- > Develop with the Copia Managing Director, a systematic process to track and review all contracts entered into by Copia.
- > Act as the administrative support for Copia's Governance Committee, including preparing documents ahead of any meetings, taking and issuing the minutes from the meeting and following up as necessary on any matters arising.
- > Source data and help maintain records as part of Copia's Risk and Compliance Management policies.
- > Establish key relationships with both internal and external sources in respect of all risk and compliance matters. Ensure, with support from the Copia Managing Director, timely execution of a risk and compliance matters.
- > Provide holiday cover to the Portfolio Associates as required.
- > Provide administrative support to the Copia Managing Director as required.
- > Provide administrative support to the Portfolio Managers and Investment Specialists as required.

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 ('TCF') 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.

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- > 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