

Position: Senior Investment Associate
Department: Umnotho Fund
Reports To: Fund Manager
Email CV to: recruitment@tianaconsulting.co.za
Closing date: 18 December 2025 at 16H00

Role Summary

To execute complex transactions and manage a sub-team responsible for deal sourcing, structuring, and implementation, ensuring that performance targets are achieved. Additionally, to provide guidance, support, and supervision to sub-team members, particularly in the execution of complex transactions.

Outputs

Business Development / Transaction Origination

- Pro-actively develop business development strategies and pursue new business development through excellent understanding of market and stakeholder networks
- Identifies lucrative market opportunities through an excellent understanding and interpretation of sector analyses, including market structure, supply and demand aspects, competitor environment, and gap analysis and taking actions accordingly
- Actively participate in formulating, developing and implementing the business development strategy to generate new investment opportunities in the South African BEE financing market
- Engage in the activities and efforts required for the implementation of the business development plan
- Conduct business development in response to new markets, products and clients
- Develop strategic relationships with financial institutions, corporate finance advisors, other intermediaries and BEE groups
- Participate and represent the organisation at investment conferences and roundtable discussions
- Engage in activities that ensure the investment initiatives are in support of broader South African economic development strategies and/or government BEE strategies

Transaction Execution

- Act independently in all spheres of project management, expert in deal structuring and negotiations. Acknowledged as a very experienced deal maker/ transactor both within and outside of the ORGANISATION
- Mobilize, coordinate and guide internal and external resources to appraise transactions/project/applications
- Manage and influence internal decision making and transaction processes to obtain investment approval
- Utilize expert knowledge (of BEE market, financial market, macro-economic environment sector) as to support, lead team in identifying and suggesting/recommending appropriate mitigation measures on key risk issues
- Conduct comprehensive due diligence investigations on approved transactions by providing input on scoping and partaking in due diligence exercises with minimal support

- Recommend, develop, negotiate innovative/optimum/appropriate finance and legal structures for each investment deal ensuring long term sustainability/viability of the project to the benefit of the client and organisation
- Provide advice, guidance to legal department on the commercial terms in the preparation of legal documentation
- Negotiate with clients/co-financiers on an acceptable deal structure, financial terms, security to ensure successful deal closure incorporate and writing reports
- Ensure the timeous execution of legal documents in accordance with approved term sheets
- Acknowledged reputation within the organisation and externally based on successful deal closure and expertise
- Act as a mentor to Investment Associates and Investment Analyst
- Oversees and manages the implementation of projects through timeous disbursements paid out to the satisfaction of the client
- Provides expertise on structures recommended to FMTPFC and other Investment Committees by Investment Associates
- Pro-actively identifies potential areas of non-compliance, increased risk and set-up/initiate an action programme accordingly

Deal Sustainability / Risk Management / Portfolio Management

- Responsible for surveillance, compliance, pro-actively anticipates and implements corrective actions, lead discussions in negotiating possible solutions
- Makes recommendations on effective solutions to sustain client relationships in the event of a default without causing a dilution in the asset value of the organisation
- Represents the organisation on Boards of Directors of selected investee companies

Experience / Skills Required

- 5 years similar experience in private equity/project finance/structured finance
- Deal structuring
- Project management

Qualification Requirements

- BCom degree in Finance/ Accounting
- Post Grad added advantage

Personal Attributes/Behaviours/Attitudes

Cognitive Competencies

- Analysis and Attention to Detail
- Focus & Sustained Attention
- Judgement and Decision Making
- Problem Solving & Learning Agility
- Tolerance of Ambiguity

Intrapersonal Competencies

- Assertiveness
- Drive and Result Orientation
- Decisiveness & Action Orientation
- Ethical Judgement

- Excellent / Quality Orientation
- Resilience and Stress Management
- Rule Orientation
- Time and Self- Management
- Objectivity

Interpersonal Competencies

- Building Relationships
- Building Strategy Relationships/ Networking
- Customer Service Orientation
- Engaging Diversity
- Interpersonal Agility
- Teamwork Communication Competencies
- Conflict Management
- Influencing & Impact (incl. Negotiation)
- Presentation and Facilitation
- Verbal and Written Communication
- Persuasiveness / Selling Skills

Functional Competencies

- Anticipating and Managing Change
- Building the Brand
- Business insight and Risk Awareness
- Commercial and Financial Acumen
- Consulting / Advising
- Environmental Scanning
- Knowledge Sharing
- Organisational Awareness
- Mathematical Acumen
- Research Competencies
- Process & Tech Competence
- Programme & Project Management