

Position: Investment Associate
Department: Strategic Projects Fund
Type: Permanent
Closing date: 20 May 2026

Interested candidates should email CV to: recruitment@tianaconsulting.co.za
If you need more information about the position, please contact 011 431 1354, one of our consultant will assist you.

Purpose of the Job:

To ensure the fund achieves its investment goals, customer service, business growth and client retention objectives in line with the mandate by sourcing deals and managing the entire process from origination through to disbursement. In addition, support the process of developing portfolio projects to meet set targets.

Requirements:

- Engineering Degree with Finance Qualification
- CFA, CA(SA)
- All requisite industry bodies affiliations
- 3-5yrs Business Analysis or Management Consulting experience or
- 3-5yrs Project Management experience in a Financial/Investment Transacting environment
- Business and Financial Acumen (includes ability to identify and manage risk)

Key Performance Areas:

Pre-Screening

- Source deals aligned with mandate of employer
- Network with industry bodies
 - Attend conferences, i.e. Keep up breast with industry developments
- Address telephonic enquiries and walk ins in support of Pre-Investment
- Conduct pre-screening analysis for new enquiries and applications as required by Fund Manager
- Conduct desktop analysis studies to determine viability of early-stage projects
- Meet with prospective clients, provide advisory on Organisation products and services
- Accompany prospective/applicant to strategic meeting(s) to assist to finalise their application
- Identify in which stage of project is and ensure all requisite information for that project phase is made available.

Application

- Conduct equity valuation discussions and negotiations with the prospective applicants
- Conduct due diligence investigations on applications that satisfy the pre-screening assessments
- Develop a financial model of the due diligence outcomes
- Compile a submission report outlining the outcomes of the due diligence
- Assist legal with project background to enable them to conduct their due diligence
- Provide input to enable legal to issue a project term sheet
- Timely engagement of Credit Risk to ensure that the risk report is submitted timeously
- Inform secretariat to include the application as an Agenda item to the relevant committee meeting
- Prepare a presentation for the submission and ensure it is circulated to secretariat before the meeting
- Present due diligence output to relevant committees to seek approval for funding.

Post Approval

- Assist clients in satisfying any relevant compliance requirements (FICA) etc.
- Assist clients in satisfying conditions precedent for funding
- Conduct an induction of Project Promoters of the SPF Governance Framework (i.e. How to conduct business the Organisation SPF way)

- Assist in disbursement of funds to meet project development activities
- Participate in project steering committees
- Derive suitable project development milestones for the project to tie them to the project promoters or project manager's contract
- Appoint a suitable project manager for the project and recommend to the Fund Manager for consideration of approval
- Oversee the project development process
- Manage the approved project budget to ensure it is applied to suitably approved project activities and milestones
- Present the project development progress at the SPF Portfolio Management Committee meetings
- Provide project support to other projects
- Provide input into Post Investment's Risk Portfolio Management Committee report
- Conduct timely disbursement to projects under implementation and manage the teams to meet with their SLA
- Ensure that tender process conducted by the project are in alignment with the governance framework and/or Organisation procurement policies (whichever is applicable on the project).
- Present the outcome of the project development process when the key milestone is achieved.
- Proactively engage other funders for capital raising efforts for projects under development
- Conduct post investment valuations of equity investments of Organisation.
- Proactively engage with relevant strategic stakeholders to ensure significant project progress is achieved.

Non-core

- Participate in external committees as required (e.g. SPII, BIFF etc.)
- Present speeches in representation of the organisation as and when required
- Proactively engage other Organisation support departments before concluding any deal
- Ensure KPA and statutory requirements on projects in administration are satisfied
- Lead on at least 3 projects that are active and supports at least 3.

Other Key Competencies:

The candidate must demonstrate the following skills and attributes:

- Excellent interpersonal and emotional intelligence skills,
- Ability to work under pressure,
- Extremely detail-oriented,
- Proven technical research and analysis ability,
- Excellent drafting and presentation skills must be highly organised and innovative with excellent written communication, planning skills, and demonstrate commitment to operational efficiency.