

# ASSOCIATE/SENIOR ASSOCIATE PRIVATE EQUITY & INFRASTRUCTURE

CBRE Caledon is a leading infrastructure and private equity solutions provider. The firm seeks to create long-term value for its clients by accessing and managing high-quality investment opportunities and building comprehensive and customized infrastructure and private equity portfolios. CBRE Caledon's business model is to combine direct investments, co-investments, secondary investments, and primary fund investments in a manner to suit each client's unique investment objectives. The firm currently provides its services through customized separately managed accounts, portfolio management advisory solutions and pooled funds. Since its inception in 2006, the CBRE Caledon team has grown to over 30 people and manages over CA\$9 billion of assets on behalf of 15 clients across North America.

## THE ROLE

We are looking for an associate and/or senior associate to join our growing team of investment professionals. These are dynamic roles which will focus on a variety of private markets research and private equity and infrastructure investment activities. Working closely with senior investment professionals, you will play an important role as part of a versatile team in making global investments with responsibilities in the following areas:

- Assist in all aspects of the investment process including the sourcing, analysis and diligence, execution, structuring, and negotiations of fund investments, co-investments and direct investments across both private equity and infrastructure; involved in documentation/deal closing procedures for completed transactions
- Prepare detailed investment recommendations outlining key elements of the investment thesis, including an assessment of the relevant merits and risks of each investment, supported by in-depth research and analysis of market and industry trends, track record evaluation, competitor analysis, and other factors in support of the investment thesis
- Assist with all facets of portfolio management, including portfolio construction and monitoring, allocation analysis, establishing and adhering to investment guidelines, and establishing appropriate investment benchmarks
- Assist in managing the deal flow/pipeline of opportunities, conducting market/industry research, performing valuation and track record analysis, and creating detailed financial models
- Assist in the development of private markets investment strategies, including preparing educational materials for senior management and investment committees, and as required, playing a supporting role in various business development initiatives for the firm

## QUALIFICATIONS

- Completion of a university degree in Commerce, Finance, Business Administration, or a related field, with a strong academic record. Technical degrees, such as in engineering, may also be considered
- 3–5 years of relevant investment experience in private equity or infrastructure (5–7 years for senior associate); some fund investment experience is considered an asset. Relevant experience in investment banking or consulting may be considered
- Well-developed qualitative and quantitative analytical skills, including financial modeling, valuation, and due diligence capabilities
- Highly proficient at financial modeling in Excel with advanced abilities in Word and PowerPoint applications
- Strong oral and written communication skills, intellectual agility, and time management skills
- Completion of, or enrollment in, a professional designation (e.g. CFA, CA, CBV) is considered an asset as is fluency in multiple languages, particularly French

Further, you are an ambitious self-starter and a solid team player with a positive attitude. You possess high professional and ethical standards and endeavour to perform work beyond what is required at your level. You are willing to “roll up your sleeves” in an entrepreneurial environment to get work done as necessary. You have a demonstrated ability to be resourceful and persistent in gathering and assessing information and to quickly assimilate knowledge.

**If you are interested in applying and have the qualifications for this role, please submit your resume and cover letter directly to [agoffredo@cbrecaledon.com](mailto:agoffredo@cbrecaledon.com)**

