



Director of Professional Services

CAPS

Position Description

CAPS is looking for an individual to help establish the professional services arm of our organization. This individual should have at least 10 years of experience in investment performance analytics, with a deep understanding of GIPS compliance and SEC advertising requirements.

Our clients range from smaller asset managers to highly complex organizations with OCIO divisions. The new professional services division will help capitalize on a growing area of the business. This division will create repeatable, high-quality processes for standard client implementations as well as craft solutions for complex issues unique to each client. The ideal candidate will advise prospects, clients, and internal development teams on questions that arise in reporting composites and investment performance.

This is a full-time position reporting to the CEO. You will be part of a small but effective organization and have a direct impact on the success of the business. CAPS' attention to detail and commitment to superior customer service has resulted in a near perfect client retention rate.

Experience/Skills Required

- 5 years of experience with GIPS
- 5 years of experience with SEC advertising requirements
- Demonstrated experience in the investment management industry, especially relating to investment performance and analytics
- Knowledge of and experience with the CAPS software
- Proficient in Microsoft Office and Excel
- Highly organized, self-directed, and able to work without supervision
- Ability to work both individually and in a team environment
- Attend and participate in team/company meetings remotely and in person from time to time
- Communicate constructively with other team members, employees, suppliers, and clients
- Identify and communicate opportunities for improvement in processes, practices, or procedures
- Actively work with and support other employees to achieve business goals
- Excellent written and spoken English
- Permanent legal right to work in the United States

Additional Desirable Skills

- Detailed understanding of the investment management process
- Experience calculating, documenting, and formulating risk measures
- Experience working with verifiers and internal compliance departments

About CAPS

Established in 1996, CAPS, Inc. provides management and reporting software to the global investment management industry. Our software helps firms achieve and maintain compliance with industry-specific performance calculation and reporting standards.

At CAPS, we're committed to providing excellent software, service, and support to our clients. Our commitment to superior customer service is second only to our commitment to hire individuals who possess a broad range of skills and career goals and are motivated to take on challenging tasks.

CAPS consists of a head office in Maitland, FL and a remote workforce mostly located within Central Florida.

How to Apply

To apply, please email your resume and a description of your firsthand experience with GIPS compliance to jobs@capsinc.com.