



POSITION DESCRIPTION

Title	Foundations Investment Manager
Department	Corporate Services
Reporting to	Chief Operating Officer
Location	Sydney
Last Updated	May 2025
Employment	Permanent Part time (50 hours per month)

PURPOSE:

The purpose of the role is to lead the operational, governance and investment-management functions of the Australian Olympic Foundation (AOF) and lead the development, launch, and growth of the Australian Olympic Community Fund.

The role combines strategic investment oversight with stakeholder engagement, product development, and capital raising activities.

KEY DELIVERABLES

For the Community Fund

Community Fund Launch & Development:

- / Drive the structuring, establishment, and launch of the unit trust product.
- / Coordinate with legal, registry, trustee, compliance, and fund administration partners.
- / Oversee investment operations and reporting processes.

Manager, External Partners:

- / Liaise with underlying pro bono fund managers to establish and maintain investment capacity.
- / Work collaboratively with the Olympic Community Foundation, governance bodies
- / Cultivate strong relationships with service providers, research houses, and platform partners.

Manager, Investment Advisory Committee (IAC):

- / Responsible for coordination/secretariat of the IAC, preparation of materials, and portfolio performance analysis.
- / Maintaining and ensuring compliance with the Investment Policy.

Capital Raising & Distribution:

- / Build relationships with wealth management firms, private client advisers, and financial planners.
- / Develop product collateral, presentations, and investor communications.
- / Support investor education and due diligence processes.

Product Management & Marketing:

- / Manage product performance reviews and updates in collaboration with the investment committee.
- / Ensure alignment of fund messaging with the philanthropic mission and commercial value proposition.
- / Monitor market trends and identify growth opportunities within the adviser and wholesale investor segments.

Lead Day to Day Operations

- / Act as Responsible Officer on Corporate Authorised Representative (AFSL)
- / Work collaboratively with support teams (AOC Finance, Legal, Marketing, IT).
- / Co-ordinate regular compliance and operations sign offs to service providers
- / Ensure service standards are met across performance, purpose & investor experience

For the AOF

Investment Management:

- / Manage the AOF investment portfolio.
- / Lead redemptions and re-allocations across the portfolio in line with the Investment Policy and IAC recommendations.
- / Work collaboratively with support teams (AOC Finance, Legal).

Manager, External Partners:

- / Manage contact and relationships with the underlying fund managers.
- / Manage contact and relationship with external investment advisor, including periodic performance reviews.
- / Cultivate strong relationships with research houses.

Manager, Investment Advisory Committee (IAC):

- / Responsible for coordination/secretariat of the IAC, preparation of materials, and portfolio performance analysis.
- / Maintaining and ensuring compliance with the Investment Policy.

ADDITIONAL RESPONSIBILITIES

- / Demonstrate the AOC values and ensure that they are embedded in all that we do.
- / Be aware of the compliance infrastructure and work in a manner in which minimises exposure to reputational, regulatory, financial, operational and/or commercial risk.
- / Maintain an understanding of the AOC's commitment and expectations of our Child Safe policy and guidelines and take action to ensure we do our utmost to protect children and young people from harm.
- / Be mindful of health & safety obligations & responsibilities to ensure the AOC complies with regulations and provides a safe workplace for all employees and volunteers.
- / Understand and execute on AOC's Social Responsibility actions including the Reconciliation Action Plan and Sustainability objectives.

QUALIFICATIONS & EXPERIENCE:

- / 7+ years in investment management, funds management, or financial-services operations, ideally in an endowment, foundation or wholesale-funds setting.
- / Strong understanding of the Australian managed-funds landscape, fund-of-fund structures, and unit trusts.
- / Demonstrated experience supporting Investment Committees and/or Boards, including agenda planning, paper preparation and minute-taking.
- / Track record of working with external advisers, fund managers, wealth platforms, research houses.
- / Familiarity with audit & risk, company secretarial, and not-for-profit / endowment governance.
- / Sound financial-reporting acumen and the ability to partner closely with AOC Finance.