## Main Purpose

To take responsibility for and ownership all aspects of the portfolio and customer propositions for Retirement Capital.

## Position

The Portfolio and Propositions Director reports directly to the Managing Director.

The Portfolio and Propositions Director position covers the following duties and responsibilities:

## Duties

1. Responsible for compliance with all laws, governance and reporting required by legislation.
2. Responsible for the generation and management of all portfolio deliverables.
3. Responsible for all Value Propositions.
4. Responsible for understanding all changes to the structure and product set of the company and partners.
5. Responsible for the portfolio strategy and adherence to that strategy.
6. Responsible for performance reviews with all partner companies.
7. Responsible for proposition development and management
8. Assistance in a pre-sales capacity
9. Responsible for post-sales delivery strategy and execution.
10. Manage expenses and costs associated with the function
11. Provide monthly updates to the Board of Directors of Retirement Capital
12. Maintain and promote adherence to the Quality Management System of Retirement Capital
13. Maintain a company calendar showing activity and whereabouts.
14. Maintain a Duty of Care for direct reports.
15. Liaise with counterparts in Headquarters and with other operating country management.

## Experience and Qualifications

1. Minimum of ten years’ experience as senior management.
2. Minimum of ten years’ sales experience at senior level.
3. Good Microsoft Office skills
4. Knowledge of Google Apps desirable
5. Knowledge of Quality Management Systems desirable
6. Good organisational skills
7. Good communication skills
8. Good interpersonal skills

Signature:

Date: 14/11/2020