Position Overview

Since 2011, **IBS Investment Bank** and its affiliate, **IBS Institutional Capital** ("**IBS**"), have held a distinguished position in executing private credit, private equity, and investment banking transactions for middle-market companies and real estate owners. As an IBS Operations & Executive Associate to the Chairman & CEO, you work directly alongside our chairman in a high-visibility, fast-paced role. This position, a hybrid of executive administration, firm communications, and portfolio tracking, requires an experienced professional to master our private credit and equity operations. You will serve as a primary information conduit—compiling data, tracking metrics, and communicating initiatives among the senior staff, operating partners, and our broader private-credit and portfolio-company network.

- **The Work Split:** Approximately 70% Business & Portfolio Operations and 30% Family Office & Personal Support.
- **Schedule & Onboarding:** This role features an intensive, **fully in-office 90-day onboarding and phase-in** to ensure complete alignment with our corporate culture and proprietary methodologies. Long-term hybrid scheduling flexibility (e.g., 3 days in-office, 2 days remote) and compensation growth are tied directly to your ability to operate and execute initiatives independently.
- **Compensation**: Open / Commensurate with experience and capacity (applicants must provide their desired salary in our HR portal).

Core Responsibilities

1. **Portfolio & Private Credit Operations Support**
    - Data Synthesis & Conveyance: Gather weekly performance updates, asset data, pipeline reports, and transaction metrics from our private credit platform and portfolio companies. Clean, summarize, and package this data into accessible executive briefings for the CEO.
    - Cross-Functional Synergy: Partner closely with our internal Operations Manager and administrative team to track CEO directives, ensure portfolio milestones are achieved, and maintain seamless firm-wide workflow velocity.
    - Meeting & Committee Prep: Compile presentation materials, deal memoranda, and summaries for credit committees and portfolio review sessions. Participate in executive meetings alongside the CEO to record concise notes and meticulously track deliverables.
    - Executive Administrative Flow: Provide sharp, high-urgency administrative support tailored directly to the CEO's day-to-day corporate schedule.
2. **Public Relations & Brand Champion Support**
    - Executive Presentation: Assist the CEO with public engagements, panel discussions, and advisory assignments, coordinating tracking tools and logistics.
    - Content Logistics: Help coordinate the dissemination of messaging, public relations content, and marketing communications strategies to support company growth.
    - Stakeholder Contact Management: Serve as the day-to-day point of contact for select client interactions and ensure the firm's CRM or client portal database is pristine and up to date.
3. **Family Office & Personal Support**
    - Lifestyle Logistics: Manage the CEO's personal asset schedules, healthcare appointments, family travel, residences, household vendors, and other confidential family-office matters.
    - Property & Vendor Coordination: Serve as the central point of contact for premium residential properties, household maintenance crews, and specialized personal vendors.
    - Discreet Administration: Support confidential family office administration and ad hoc personal tracking.

Qualifications & Requirements

- **Education:** Bachelor's degree preferred.
- **Residence:** Must live within a 10-mile radius of western Wellington, Florida.
- **Experience:** Three to five years of professional experience in finance, real estate, project management, or advanced corporate operations support. Experience in private equity, private credit, or banking is a major plus.
- **Communication & Presence:** Elite verbal and written communication skills. You must be able to interface professionally and confidently convey parameters to senior portfolio executives, lenders, and internal leadership.
- **Numerical & Data Literacy:** Advanced financial modeling is **not** required for this specific role. However, you must possess strong mathematical literacy, keen attention to detail, and the cognitive capacity to spot inconsistencies in portfolio reports instantly.
- **Technical Savvy:** Proficient in Microsoft Office 365 (particularly PowerPoint and Excel for data presentation) and modern CRM or project management platforms.
- **Discretion:** Absolute integrity and a proven track record of safeguarding proprietary methodologies, material non-public information (MNPI), and private family matters.