

## INVESTMENT OFFICER LINES OF CREDIT

**ROLE SUMMARY:** The Investment Officer LoC supports the deployment and management of Lines of Credit (LoC) to partner Financial Institutions (Fis) to enhance their ability to provide accessible and affordable credit to agribusinesses and farmers. This role is vital for ensuring that LoC products are effectively utilized to foster growth and promote financial inclusion with the agricultural sector.

aBi

**REPORTS TO:** Investment Manager LoC

**SUPERVISES:** None

### SCOPE OF RESPONSIBILITIES

Area of Responsibility	Action Steps	Success Criteria/Measures
<b>Operational and strategic support</b> Support the implementation of strategy by providing in-depth financial research and analysis, ensuring alignment with aBi Finance's long-term growth and sustainability goals.	Assist the Investment Manager in coordinating the deployment of LOC products, ensuring all necessary documentation is prepared, submitted and filed on time.	<ul style="list-style-type: none"><li>All necessary documentation for LOC product deployments prepared and submitted on time, with no significant delays in product launches.</li><li>Logistical support provided for all product launches, through smooth coordination with FIs and timely follow-up on operational challenges.</li></ul>
	Provide logistical support during product launches, including organizing meetings with Financial Institutions (FIs) and Managing follow-up communication to resolve operational challenges.	
	Assist with the maintenance and update operational guidelines for LOC products, ensuring that FIs have clear instructions on eligibility criteria, loan/guarantee structures, and implementation processes.	
	Regularly gather and compile feedback from FIs on /LOC product performance, communicating key findings to the Investment Manager for strategic adjustments.	
	Assist in conducting market research to identify opportunities and challenges for LOC products, preparing summaries and reports for the Investment Manager.	

<p><b>Support to Pipeline &amp; Portfolio Growth</b></p> <p>Assist the investment Manager in identifying and managing a robust pipeline of investments, for example by overseeing disbursements and recoveries and by performing initial screenings and assessments to ensure alignment with aBi's strategy and goals.</p>	<p>Support the Investment Manager by coordinating meetings with potential FIs for LOC partnerships, preparing necessary documents, and Managing meeting logistics.</p> <p>Assist in drafting and reviewing partnership agreements, ensuring all legal and financial terms are in place before moving forward with formal negotiations.</p> <p>Maintain and update the pipeline tracker, supporting the Investment Manager in monitoring the progress of LOC partnerships, disbursements, and performance metrics.</p> <p>Assist in gathering and analyzing data on FI capacity gaps, providing logistical and technical support to ensure FIs can effectively deploy LOC products.</p> <p>Assist in the preparation of portfolio growth reports, summarizing the progress of existing and potential partnerships and updating the Investment Manager on performance.</p>	<ul style="list-style-type: none"> <li>• Preliminary financial analysis and market research conducted for at least 5 new investment opportunities annually, supporting the LOC pipelines.</li> <li>• Efficient and flexible support provided to investment Managers before, during and after meetings and communications with potential FIs.</li> <li>• Pipeline tracker regularly updated, with key milestones tracked and reported.</li> </ul>
<p><b>Investment Monitoring and Support</b></p> <p>Support the monitoring and reporting of the investment team's portfolio to ensure the long-term growth and sustainability of capital for Agribusiness financing interventions, contributing to aBi Finance's long-term objectives and capital growth.</p>	<p>Collaborate with the RMRD Manager to collect data from FIs on the performance of LOC products, ensuring all required metrics such as loan disbursement, repayment rates, and impact indicators are reported accurately.</p> <p>Assist in preparing performance review materials for regular meetings with FIs, organizing data on product utilization, repayment behaviour, and impact on financial inclusion.</p> <p>Regularly compile feedback from FIs regarding operational challenges and opportunities with LOC products, presenting findings to the Investment Manager for action.</p> <p>Support the organization of field visits to assess the impact of LOC-backed loans, ensuring that logistics are managed and assessment reports are prepared in coordination with the Investment Manager.</p>	<ul style="list-style-type: none"> <li>• Performance data collected and organized for all LOC investments, resulting in effective use of the performance monitoring frameworks.</li> <li>• Field visits to partners facilitated through smooth operational and logistical support to investment Managers.</li> <li>• Summaries of project performance prepared quarterly, highlighting key</li> </ul>

	Help draft performance and impact reports for internal and external stakeholders, summarizing key outcomes and lessons learned from LOC deployments.	financial, social, and environmental results, with areas for improvement identified.
<b>Stakeholder and Investor Relationship Management</b> Facilitate strong relationships with financial institutions and investment partners, ensuring smooth onboarding and ongoing engagement to build trust and attract additional investment, while strengthening aBi Finance's reputation as a trusted investment partner.	Assist the Investment Manager in onboarding new FIs and investment partners, ensuring that all necessary documentation is prepared and the onboarding process is seamless.	<ul style="list-style-type: none"> <li>Stakeholder engagement tracker maintained and updated regularly, with key interactions and follow-ups documented for ongoing projects.</li> <li>Logistical and administrative support provided for onboarding processes, ensuring all required documents are submitted within Agreed timelines.</li> <li>Support provided for stakeholder engagement meetings, ensuring timely preparation of Agendas, presentations, and follow-up action plans.</li> </ul>
	Help organize meetings with existing FIs and partners, preparing Agendas, background materials, and follow-up action points to ensure strong engagement and relationship Management.	
	Support the preparation of reports and presentations for stakeholders, highlighting the performance and impact of LOC products and fostering trust with investors.	
	Maintain regular communication with FIs and investment partners, ensuring timely responses to inquiries and addressing any administrative or operational issues.	
	Assist in tracking the engagement of stakeholders and investors by maintaining organized records of interactions, ensuring that follow-up actions are taken to strengthen relationships.	
<b>Support to Risk Management &amp; Compliance</b> Provide risk and compliance support to the investment team, including due diligence, appraisals and document	Assist the Investment Manager in conducting due diligence and appraisals for potential LOC partnerships, collecting financial and operational data from FIs.	<ul style="list-style-type: none"> <li>Due diligence documentation and findings for potential investments organized, consolidated, and submitted to</li> </ul>
	Support the preparation and submission of risk assessments for LOC deployments, ensuring potential financial and operational risks are identified and mitigated.	

<p>Management, contributing to thorough risk assessments and compliance with financial and operational standards.</p>	<p>Maintain an organized record of risk Management and compliance documentation for each LOC deployment, ensuring all materials are accessible for audits and reviews.</p>	<p>Investment Managers on time.</p> <ul style="list-style-type: none"> <li>• Compliance reports from FIs reviewed regularly, with inconsistencies flagged and corrective actions coordinated with the Investment Manager.</li> <li>• Support provided to Investment Managers in preparing risk and compliance reports, ensuring that relevant data is gathered, organized, and integrated into final reports.</li> </ul>
	<p>Monitor compliance reports submitted by FIs, flagging any inconsistencies and coordinating corrective actions with the Investment Manager to address any issues.</p>	
	<p>Liaise with the Legal team to ensure that all LOC agreements are properly documented, filed, and compliant with legal requirements, and assist in Managing legal documents related to LOC products.</p>	
<p><b>Team Collaboration</b> Contribute to a collaborative work environment and support initiatives on both investment team and departmental level to enhance cohesion and improve overall team effectiveness.</p>	<p>Provide daily administrative and logistical support to the Investment Manager, assisting with meeting coordination, document preparation, and follow-up on internal communication.</p>	<ul style="list-style-type: none"> <li>• Administrative support provided for all internal team meetings, with discussions documented and action points tracked for follow-up.</li> <li>• Flexible support provided during peak workload periods, contributing to seamless execution of projects and timely completion of key milestones.</li> </ul>
	<p>Collaborate with the Investment Manager and other team members to ensure LOC activities are aligned with organizational goals and key performance targets.</p>	
	<p>Assist in organizing team meetings, preparing materials for discussions, and documenting decisions and follow-up actions to ensure alignment on LOC activities.</p>	
	<p>Work closely with colleagues across departments to ensure effective coordination of LOC-related activities, such as finance, risk Management, and compliance oversight.</p>	

	Support the Management of the investment team by helping track performance goals, assisting in team coordination tasks, and ensuring the timely delivery of team objectives.	<ul style="list-style-type: none"> <li>Timely internal communications ensured by disseminating project updates, compliance reports, and key insights across relevant teams at aBi Finance.</li> </ul>
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And other duties as requested by the **Investment Manager LOC**

## REQUIREMENTS OF THE ROLE

<b>Qualifications</b> <ul style="list-style-type: none"> <li>Bachelor's degree in finance, Business Administration, Economics, Agricultural Economics, or a related field.</li> </ul> <b>Experience</b> <ul style="list-style-type: none"> <li>A minimum of 3-5 years of relevant experience in investment analysis, financial structuring, or agribusiness finance.</li> <li>Experience in working with financial institutions, particularly in developing financial products and risk mitigation strategies.</li> </ul>	Competency	Level 1 Standard	Level 2 Specialist	Level 3 Team Leader	Level 4 Leadership
	<b>Ownership &amp; Initiative</b>		√		
	<b>Learning &amp; Adaptability</b>		√		
	<b>Situational Awareness &amp; Thinking</b>		√		
	<b>Execution &amp; Drive for Results</b>		√		
	<b>Understanding Others &amp; Team Collaboration</b>		√		
	<b>Communicating &amp; influencing</b>		√		

- Previous exposure to agribusiness financing or development projects is highly desirable.

**Technical Skills & Knowledge**

- Familiarity with the agricultural sector and financial challenges faced by agribusinesses and smallholder farmers.
- Understanding of the financial services landscape in Uganda.
- Knowledge of relevant regulations and compliance requirements in agribusiness financing.
- Effective verbal and written communication skills for clear and effective reporting and client engagement.
- Ability to build and maintain relationships with stakeholders, including financial institutions, clients, and internal teams.

**SIGNATURES**

Name of Job Holder:	Signature(s):	Date:	Name of Supervisor:	Signature(s):	Date: