Firstport for Social Entrepreneurs Ltd

Investment Associate – Role Description

August 2026

Job title:	Investment Associate
Reporting to:	Head of Investment Programmes
Salary:	£35,000
Hours:	Full-time, 35 hours
Based:	Home working, with access to our office in Edinburgh and occasional travel throughout Scotland
Start date:	ASAP
Contract:	12-month fixed term contract with potential to extend

About Firstport

Firstport is part of the Firstport Group, Scotland's leading agency for supporting social entrepreneurs, social enterprises, and purpose-led businesses. Encompassing Firstport for Social Entrepreneurs, Firstimpact and Firstfund, the group has nearly 20 years of experience helping thousands of entrepreneurs to develop, start, and grow their businesses.

Our group vision is a society in which doing business is synonymous with doing good. Deliberately ambitious, our vision describes the prospect of a society where all businesses operate to the benefit of their communities, in harmony with nature, and with respect for future generations.

- Firstport is the first port of call for social entrepreneurs.
- Firstimpact is an expert ally to projects and businesses that are serious about social impact.
- Firstfund provides sympathetic finance to ambitious social impact businesses.

We are committed to equality, diversity, and inclusion, and we aim to recruit and retain the best candidates from the widest pool of talent, one which reflects the communities we serve.

We strive to create an environment where everyone can be themselves and do their best work. We offer:

- A generous holiday package with 33 days of annual leave entitlement (including bank holidays). Office closure on the days between Christmas and New Year, in addition to annual leave entitlement.
- Pension scheme

- Flexible working
- An Employee Assistance Programme, which provides access to a range of support relating to work/life balance, physical, emotional, and mental health
- Bike-to-work scheme

Find out more about us on our website or read our Working at Firstport document.

Job description

The Investment Associate will play a key role in the delivery of Firstport's investment readiness and repayable investment programmes, supporting ambitious social enterprises seeking investment to grow. They will bring additional financial expertise to the team, working directly with social enterprises participating in our investment readiness programme as well as on investment assessments.

The role holder will work alongside the Investment Readiness Manager to provide bespoke cashflow support to participants in the LaunchMe programme.

They will assist the Investment Managers in assessing applications to our repayable investment programmes across a range of financial, social, and strategic considerations, and to contribute to written assessments presented to Investment Committee for decision.

They will also work alongside the Growth Advisor to support the portfolio of social enterprises who have received investment, including preparing documents, repayments and other post-investment matters.

Key duties & responsibilities

- Assist with the assessment of investment applications to Firstport's different investment products, including financial analysis, and contributing to reports for Investment Committee decisions.
- Assist with draw down processes.
- Support portfolio management processes, including repayments.
- Assist the Growth Advisor to support investees and to monitor portfolio performance.
- Assist with organisation and admin for Investment Committee meetings.

- Work with social entrepreneurs to gain a better understanding of their cashflow, support the creation of cashflow models and tell the story of their organisations via numbers.
- Improve and enhance cashflow support within the investment readiness programme, suggesting and implementing changes that meet the needs of participants.
- Assist in preparation of data and information for inclusion in reports for board and stakeholders.
- Represent the team at external events and meetings and raise awareness of the investment readiness programme and Firstport investments.
- Support colleagues within the Investment Team and other Firstport teams as needed.

Person specification - skills and key qualities

We are looking for talented people from a wide range of backgrounds and communities. Whether through lived or gained experience, or both, you will understand and share a passion for what we do.

Essential

- Experience in building cashflow models, cashflow forecasting and stress testing.
- Experience in supporting investments into SMEs, startups or social enterprises, OR experience in a finance role at a social enterprise.
- Good people skills combined with financial skills - the ability to work 1-1 with social entrepreneurs and to turn the story of how their social enterprise works into a cashflow model.
- Ability to understand, analyse and communicate complex financial information.
- Strong written and presentation skills.
- Excellent interpersonal and relationship building skills.
- Digitally confident, open to using a range of tools (We use MS Office suite, Google suite, Slack, Trello, and Mural/Miro).
- Ability to work independently and adopt a problem-solving approach.
- Strong organisational and prioritisation skills.
- Able to manage competing demands and prioritise time effectively.
- Attention to detail.

- Eligibility to work in the UK.

Desirable

- Finance qualification and/or membership of relevant professional body (or part qualification).
- Experience/understanding of early-stage companies and/or social enterprises.
- Experience in using Salesforce or other CRM.