

Digital Learning 

A Guide to Typical Roles in a PE/VC Firm



A Guide to Typical Roles in a PE/VC Firm

Digital Learning

Please see below for some examples of job roles and teams within the Private Equity (PE) and Venture Capital (VC) industry. Job titles will vary between geographical location and even between different firms, so you may spot some similarities in the responsibilities.

This list is by no means exhaustive, as many individuals contribute to a PE or VC transaction.

Investment team:

Analyst: Entry-level role responsible for conducting financial analysis, preparing reports, and supporting the team on deal sourcing and execution.

Associate: More experienced role responsible for playing a key role in the deal sourcing, due diligence, evaluation, and execution process. Also works on portfolio management and value creation initiatives.*

Senior Associate: Typically expected to implement deal processes from start to finish, closely involved in portfolio management and overseeing junior staff.

Vice President: Responsible for leading deal teams and overseeing the investment process. Works closely with partners to develop and implement investment strategies.

Director or Principal: Responsible for sourcing, negotiating and evaluating deals, leading deal teams, and managing portfolio company performance

Partner or Managing Director: Senior-level role responsible for deal flow, portfolio management, final investment decisions and providing input into fundraising.

Managing Partner: Most senior executive role responsible the overall strategic and operational direction of the firm, including managing the firm's portfolio companies, raising capital from limited partners and administering the funds that the firm manages.

*Some firms will have team members exclusively focused on origination

A Guide to Typical Roles in a PE/VC Firm

Digital Learning

Support teams:

Investor Relations (IR): Responsible for managing relationships with the firm's limited partners, and reporting to them. This includes marketing and fundraising.

Compliance: Responsible for ensuring that the firm complies with all applicable laws and regulations.

Finance: Accountable for all financial aspects of the organisation including the financial management of funds. **Operations:** Responsible for the day-to-day operations of the firm, including finance, accounting, and IT.

Portfolio Management: Responsible for monitoring and managing the firm's portfolio companies.

Legal (General Counsel): Responsible for managing all legal aspects of the firm's operations including working with law firms on transactions.

Technology: Responsible for developing and maintaining the firm's IT infrastructure.

Human Resources: Responsible for all aspects of the firm's human resources function, including recruitment, training, and compensation.

Fund Accounting: Responsible for cash flow management and modelling of funds through to fund reporting for investors.



UK Private Capital

(Formerly the British Private Equity and
Venture Capital Association - BVCA)

4th Floor, 48 Chancery Lane, London WC2A 1JF
+44 (0)20 7492 0400 | training@ukprivatecapital.co.uk
www.ukprivatecapital.co.uk/training

Find us on

