



Lavelle Capital is redefining what it means to be a modern family CIO. We serve a select group of ultra-high-net-worth families who view us as long-term partners — not just advisors. With a distinctive approach that blends deep investment expertise, direct deal access, and institutional-grade execution, we help families unlock the full potential of their balance sheets. We're now looking for a Capital Formation Lead to join us at a pivotal moment.

Your mission: Help us secure the next CIO families — families who are ready to engage Lavelle's investment advisory platform and benefit from our curated opportunities.

This role isn't about generic business development. It's about building a durable pipeline, engaging complex multi-generational families, and converting trust into long-term mandates. You'll work directly with the Founder & CIO of Lavelle, interfacing with founders, LPs, and co-investors to open the right doors and close high-quality relationships.

What You'll Own

1. Relationship Origination & Qualification

- Build and own a targeted pipeline of prospective CIO families, collaborating closely with the Founder & CIO to assess alignment on values, complexity, and long-term fit
- Activate warm networks by converting introductions from portfolio founders, current clients, co-investors, and ecosystem partners into structured relationship-building paths
- Tailor outreach strategies for multi-generational families, founder-CEOs, and newly-liquid wealth creators — blending discretion, emotional intelligence, and commercial insight

2. Client Engagement & Closing

- Run the sales process from initial introduction through proposal, diligence, and onboarding
- Collaborate with the investment, legal, and client service teams to present Lavelle's value proposition clearly
- Help design customized pricing and discretionary capital structures per family

3. Marketing & Content Support

- Coordinate webinars, capital updates, and CIO briefing materials (with support from analysts)
- Refine the narrative around Lavelle's "stacked model" (SPVs + Private Investment Consulting + CIO Services) for external audiences
- Help amplify Lavelle's visibility in key LP communities, industry events, and referral channels

4. CRM & Process Discipline

- Own the CRM and tracking of all capital formation activity
- Implement a high-trust follow-up process — you are the steward of consistency
- Report weekly on progress toward quarterly capital and family relationship goals

**What We're Looking For**

- 10+ years in capital raising, investor relations, family office services, or private wealth advisory
- Strong emotional intelligence and communication skills — you'll be in the room with billionaires and founders of have exacting standards
- Comfort working in an early-stage, founder-led environment with some ambiguity and rapid iteration
- A thoughtful, understated approach — we don't do hard selling; we build conviction and trust

Bonus If You Have

- Familiarity with alternative investments (SPVs, funds, direct deals, especially in the technology industry)
- Experience supporting family offices or acting as an outsourced CIO
- Prior work in a growth-stage investment firm building enterprise value over time

What You'll Get

- A chance to build quietly — alongside a team that values excellence over noise
- Deep exposure to exceptional families, operators, and private market opportunities
- A long-term role with room to grow into senior leadership or equity/carry participation
- Aligned compensation: competitive salary, performance-based bonus tied to family onboarding milestones, and revenue or carry share post-onboarding where appropriate

We're looking for a long-term teammate — not just an employee. For the right person, this is a rare opportunity to help shape a generational firm. Lavelle Capital is always seeking great talent. We are proud to be an equal opportunity employer, and we consider qualified applicants without regard to race, color, religion, sex, national origin, ancestry, age, genetic information, sexual orientation, gender identity, marital or family status, veteran status, medical condition or disability. We also comply with the San Francisco Fair Chance Ordinance and consider qualified applicants with arrest and conviction records.

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