

Associate, Capital Formation

About Virtus

Virtus Real Estate Capital is a U.S. private equity real estate fund manager focused exclusively on cycle resilient needs-based property sectors, such as healthcare, education, storage, and middle-income workforce housing. Founded in 2003 in Austin, Texas, Virtus has acquired or developed more than 300 commercial properties totaling over \$7 billion throughout the U.S. Virtus is known for its deep expertise in social infrastructure sectors and its commitment to people, which is driven by a strong corporate culture around its four core values: Thoughtful Evolution, Resilience, Honorable Action, and Purposeful Work.

About the Role

Virtus is seeking an Associate to join the Firm's Capital Formation team. The role is hands-on and execution-oriented, owning the Firm's capital formation technology, CRM, and market research workstreams, while supporting senior capital raisers on investor engagement, roadshows, and product communications across Virtus' real estate strategies. Primary responsibilities include:

- Owning the Firm's HubSpot CRM — administering the platform, managing data hygiene, building workflows and automations, and developing and running reporting and pipeline analytics.
- Building and maintaining the Firm's investor relations and capital formation tech stack, integrating HubSpot with email, calendar, data providers, AI tooling, and reporting.
- Applying AI tools across investor research, content drafting, transcript summarization, and pipeline analysis to scale capacity across the team.
- Conducting market research and gap analysis to identify high-priority investors, surface coverage gaps, and to inform segmentation and prospect prioritization across the investor universe.
- Partnering with senior capital raisers and coordinating investor roadshows and capital introduction campaigns end-to-end — meeting scheduling, logistics, agendas, briefings, and follow-up.
- Serving as a product specialist for investor-facing communications.
- Providing internal stakeholders with feedback on investor expectations to inform fund positioning and messaging.

Preferred Qualifications

- 2–5 years in investor relations, capital markets, or institutional sales support within private equity, real estate, or other alternative asset classes.
- Hands-on CRM experience, ideally with HubSpot.
- Fluency across the broader investor relations and capital formation tech stack: Excel and data analysis, marketing automation, AI tooling, and lightweight scripting is a plus.
- Working knowledge of fund structures, real estate strategy, and the institutional and wealth channels.
- Demonstrated accountability and execution mindset — owns workstreams end-to-end and brings structure to ambiguous problems.
- Alignment with Firm culture, with past behaviors supporting the Firm's core values.
- Bachelor's degree required; CAIA, CFA, or similar designation preferred.

Compensation & Location

Austin, Texas, with limited travel. Competitive base salary, performance bonus, and potential carry participation.

To Apply

Submit resume and cover letter to recruiting@virtusre.com with subject line: **Associate, Capital Formation**