



**Title:** General Consulting Investment Operations Supervisor

**Summary:**

The General Consulting Investment Operations Supervisor is responsible for developing operating procedures, maintaining the integrity of investment operations, ensuring compliance of our operations with company policies and procedures, and managing operations resources across multiple regional offices. This person will have staff and project management responsibilities and will be responsible for quality assurance and the on-time delivery of all client performance reporting. The role will involve the balancing of long-term strategic planning with day-to-day management of General Consulting operations. This exempt-level position will report directly to the company's Chief Operating Officer and will work closely with senior members of the General Consulting team to carry out the position's duties. This person must demonstrate independent judgment and discretion related to sensitive and confidential information.

**Essential Responsibilities:**

- Oversee the management of a staff of Performance Analysts who gather, verify, and process daily, monthly, and quarterly financial information.
- Oversee the management of a staff of Client Service Administrative Assistants who are responsible for editing, printing, binding, and distributing client quarterly reviews.
- Work with General Consulting Investment and Client Service teams to provide project management, systems implementations, and analytical support.
- Collaborate with the Marketing Team to organize the preparation of proposals and presentations of General Consulting marketing materials.
- Manage investment tools and databases, including vendor meetings, licenses, and implementations.
- Hands-on proofing of various quarterly reporting data, including market values, investment performance, and portfolio-level data.
- Collaborate with West Coast Investment Operations Manager and PM Investment Operations Manager.
- Work with Management on strategic initiatives, including metrics-based performance measurement and profitability analyses.
- Fulfill any and all other duties deemed necessary by management.

**Required Skills, Experience, Knowledge:**

- Minimum of three years of commensurate work experience in a similar role
- Bachelor's degree required; specialization in finance or accounting preferred
- Strong financial background and ability to decipher complex financial statements
- Solid understanding of accounting, economic, and investment theory and practices
- Excellent computer skills, including facility with Microsoft Word and Microsoft Excel
- Strong quantitative/analytical skills, including facility with financial/statistical concepts
- Professional and effective verbal communication skills
- Superior writing skills
- Exceptional attention to detail
- Well-developed interpersonal and people management skills



**MEKETA INVESTMENT GROUP**

**POSITION DESCRIPTION:  
GENERAL CONSULTING  
INVESTMENT OPERATIONS SUPERVISOR**

- CFA or CAIA (or progress towards) preferred, but not required