



### SUMMARY

The Investment Analyst works directly with Consultants to provide investment advisory services to client investment pools (e.g., pension funds). The Investment Analyst is responsible for managing the client investment fund reporting process, establishing and maintaining knowledge of a broad range of investments and managers, and contributing to investment and economic research. The Investment Analyst is directly involved in all aspects of the investment consulting process and will have direct interaction with the clients.

The Investment Analyst is expected to have a high level of general investment knowledge and, ideally (but not necessarily), be familiar with the investment consulting and investment management industries. Additionally, candidates should possess 3 or more years of relevant experience, and should be enrolled in the Chartered Financial Analyst (CFA) Program.

### Required Skills:

- MBA, CFA Program, and/or CAIA Program enrollee (or designee)
- A minimum of three years of relevant experience, ideally in finance/investing
- Sound understanding of economic and investment theory and practices
- Solid quantitative skills, including facility with financial and statistical concepts
- Superior written and verbal communication skills
- Superb computer skills, including facility with Microsoft Office Suite
- Excellent attention to detail
- Ability to gather, organize, coordinate, and interpret data from disparate sources
- Ability to work efficiently and accurately under pressure and to meet deadlines
- Ability to work independently and to proactively seek new responsibilities
- Ability to work well with employees from other company departments and offices
- Ability to travel periodically, up to 20% of the time

### Essential Responsibilities:

- Participate regularly in client meetings for one or more clients.
- Contribute to the firm's research activities, as needed.
- Manage report preparation and production for assigned clients, including producing financial data, number-checking, writing, and proofing quarterly reports.
- Calculate and verify client-related investment data.
- Gather and organize financial data related to client accounts and investment managers and strategies.

**Essential Responsibilities (continued):**

- Meet with and evaluate the capabilities of investment managers. Proactively identify and meet with strong managers.
- Participate in and coordinate investment manager and other service provider searches for clients.
- Assist consultants in the production of client investment policy statements, asset allocation recommendations, and related advisory services.
- Assist consultants in all aspects of client Fund Coordination services, including interacting with investment managers, custody banks, and other vendors as needed.
- Utilize investment-related software programs to aid in the evaluation of client investment structures and in the formulation of recommendations.
- Develop resources that contribute to improvements in the quality of the company's investment advisory services.
- Develop resources that create and enhance timely and efficient workflow.
- Assist with marketing initiatives, including writing Requests for Proposals, developing marketing exhibits, and participating in marketing presentations.
- Fulfill any and all other duties deemed necessary by management.

**Job Performance Evaluation Criteria Include:**

- Accuracy and timeliness of work product
- Growth in knowledge base, including general investment and economic topics, as well as client-related issues
- Degree to which specialized knowledge is communicated and available to other investment staff
- Level of proficiency with investment-related software
- Effectiveness of communication, both verbal and written, in conveying knowledge, eliciting necessary information, and meeting predefined objectives
- Contribution to improvements in the quality of the company's investment advisory services
- Contribution to improvements in the efficiency of the company's analytical processes and procedures
- Maintenance of good working relationships with other employees
- Levels of satisfaction of consultants as users of the Analyst's services