



The Public Markets Research Assistant is primarily responsible for providing operations and administrative support to the investment staff on the Public Markets Research Team, including word-processing, report production, and organizing and maintaining company files. The Public Markets Research Assistant is also responsible for maintenance of contacts, investment products, and investment managers within the company's contact databases.

The position reports to the firm's Investment Operations Manager in the San Diego office.

**Required Skills:**

- Strong knowledge and facility with Microsoft Office software, especially Word and Excel
- Strong organizational skills
- Excellent attention to detail
- Strong interpersonal skills
- Ability to work accurately in a detailed and time-sensitive environment
- Ability to work well with employees from other company departments
- Willingness to learn and understand the different facets of our business
- Minimum of two years of administrative experience in a corporate setting
- A minimum of one year of consecutive, full-time experience in the investment industry required

**Essential Responsibilities:**

- Assist Public Markets Team with preparing client-ready reports and correspondence, including editing, proofreading, and formatting client presentations and memos
- Become familiar with investment managers and strategies in order to assist Public Markets Team with research projects and client requests
- Provide administrative support to investment staff on the Public Markets Team
- Maximize company productivity through proficient use of appropriate software applications, including CRM and SharePoint Intranet
- Work with other members of the administrative staff to establish and communicate broadly uniform administrative procedures and practices
- Fulfill any and all other duties deemed necessary by management

**Measures of Success:**

- Accuracy and timeliness of client report production and correspondence
- Degree of professionalism in telephone communications with clients and others
- Responsiveness to requests for administrative support, including requests for word-processing and report production assistance
- Improvements in quality and efficiency of work product
- Levels of satisfaction of company employees, clients, and guests as end-users of the Public Markets Research Assistant's service



For Internal Use

**Projects/Responsibilities of Public Markets Research Assistant**

- Maintain investment manager contacts and products in CRM
- Upload and maintain documents in SharePoint Manager Research Portal for use by all investment professionals at the firm
  - Collect and tag commentaries
  - Upload RFPs and presentations
  - Format and upload manager analyses
  - Input meeting notes from MSIC and PMT meetings
  - Maintain the MSIC Bullpen
- Format all Public Markets Team documents prior to distribution to firm, consultants, or clients to ensure consistency across all documents
  - Proofreading and editing would be a bonus, but not necessarily a requirement (at least to start)
- Post public RFPs to MIG website, collect and organize responses, send thank you letters to all respondents, track search activity for use by Marketing
- Assist with creation of new documents for use with clients, consultants, and potential new clients