

Job Title: Investment Analyst Intern (Part-time)

Reports To: Investment Committee

Job Description: The successful candidate will be an integral part of the firm's operations and investment team. He/She will:

- Update and maintain investment data in portfolio accounting system and investment database
- Update and maintain investment related materials
- Liaise with investment manager back office
- Limited client correspondence
- Manage portfolio operations, including alternatives
- Provide valuable portfolio operations advice to Senior Advisors and Client Service Associates
- Ad-hoc resource for investment team

Desired Skill Competencies:

- **Technical:**
 - Proficient in portfolio/investment management concepts (performance and accounting)
 - Demonstrated ability in problem solving, especially in areas of portfolio performance
 - Experienced in advanced excel capabilities
 - Proficient in account and entity types
- **Communication:**
 - Demonstrated ability to correspond effectively and timely with a variety of clients, custodial contacts, investment managers, and other related professionals
 - Successfully coordinate with various third parties to work together in an organized and convenient manner for clients
- **Detailed and Organized:**
 - Ability to develop systems of organization which enable others to easily find information
 - Ability to recognize missing or incorrect information

Desired Behavioral Competencies:

- **Creating Operational Procedures and Efficiencies:**
 - Ability to recognize inefficiencies and create processes for portfolio management
 - Ability to establish measurable outcomes and create systems for monitoring progress toward them
 - Reinforce emphasis on long term, globally diversified risk management rather than short term returns
- **Teamwork and Problem Solving:**
 - Ability to recognize when specialists need to be involved, when to ask for additional assistance, and how one can fill in when another is not available
- **Personal and Professional Growth:**
 - Ability to solicit and act on constructive feedback
 - Challenge oneself with tough assignments
 - Demonstrate resilience and courage in the face of setbacks and opposition