



Amherst College

Office of Human Resources

JOB DESCRIPTION

Title: Investment Analyst

Department: CFO - Investments Reports to title: Chief Investment Officer

Full Time: x Part Time: _____ Date Prepared: March 18, 2020

Job Group & Level: PT-3 Regular Daily Work Schedule: _____ to _____

Pay Type: Weekly _____ Monthly x Months Per Year: 12 Hours Per Week: 40

(Summer Months) Months Per Year: _____ Hours Per Week: _____

1. Summary of Position:

The Analyst will be an active and engaged participant on the team and will assist in many facets of the investment process. A key aspect of success for the Investment Analyst is the ability to provide meaningful, actionable analytics in support of investment decisions being presented to the Investment Committee across a broad range of topics. This includes, but is not limited to: manager analysis, portfolio-level analysis, and capital markets analysis.

This is a three year appointment. Over the course of the program, the Analyst will gain broad exposure to the finance industry and asset management business. [AR1]

In addition, the Analyst will receive support to pursue continuing education opportunities (including the CFA and/or CAIA charters) during their tenure.

Takes appropriate actions to support a diverse workforce and participates in the College's efforts to create a respectful, inclusive, and welcoming work environment.

2. Principal Duties and Responsibilities:

It is expected that the Analyst team will support these key functions, with more senior Analysts moving along the curve from execution to self-directed project management:

- Operations/ administration: Assisting the operations team with performance reporting and generating

performance analytics, including maintaining and utilizing the data within the Morningstar and Private Informant databases, and assisting with various administrative and operational projects associated with the management of the portfolio.

- Manager and fund due diligence: attending meetings and taking notes, drafting diligence memos, performing manager analytics, and project managing a diligence process. Assisting with, and as time progresses, managing manager monitoring, including portfolio reviews, notes, and calls.
- Investment committee and team presentations: the preparation of investment proposals and presentations for Committee meetings, and team meetings. As the Analyst progresses, they will be expected to perform detailed analysis of investment topics and opportunities (strategies, sectors, geographies), prepare and refine a variety of quantitative analyses, as well as assist in various other research and analytical projects including risk management, liquidity analysis and asset allocation reviews.
- Mentoring: As the Analyst progresses, they will also assume a mentoring role and help oversee the newer Analysts, providing training on the various systems used by the Office of Investments and ensuring their understanding/proper use of the systems.
- Other responsibilities include gathering and maintaining investment related information on central spreadsheets and databases; identifying and researching anomalies; analyzing and synthesizing data relating to the investment performance and risk of fund managers, asset classes, and the overall portfolio; as well as articulating key findings and trends based on this analysis. The level of responsibility for these will depend on the respective Analyst's abilities and tenure with the Investment Office.

All employees are expected to participate in the College's efforts to create a respectful, inclusive, and welcoming work environment.

3. Internal-External Interaction/Communication:

The Investment Analyst is an internal and external representative of Amherst College and the Office of Investments and is responsible for building and maintaining productive, effective relationships on behalf of the College.

The Investment Analyst is expected to build and maintain strong working relationships with the College's external investment managers and service providers, some of whom may have an existing relationship with the College and others who are prospective in nature.

Internally, the Investment Analyst is expected to have ongoing, regular interaction with other members of the College community including, but not limited to, staff and administrative professionals, primarily in the Controller's group and more broadly the CFO group, but also throughout the entire community.

In addition, there is expected to be some engagement with the Investment Committee, the Student Investment Club and student interns.

4. Education: (include certifications and licenses)

Required: Bachelor's degree

Preferred: An excellent record of academic performance, and demonstrated interest in investing.

5. Experience: (List specific skills necessary to perform this job)
three to seven years of a combination of education/training/and
relevant experience

Required:

- Intellectual curiosity and ability to think critically
- Interest and basic knowledge of capital markets and investment concepts
- Strong orientation to detail and accuracy
- Strong demonstrated quantitative skills
- Excellent qualitative abilities, including strong verbal and written communication skills
- Self-motivated, enthusiastic, hardworking, highly organized and proactive
- Ability to work independently and as part of a small team
- Strong time-management skills including the ability to prioritize and juggle multiple projects concurrently
- Proficiency with Microsoft Excel and PowerPoint are essential and an aptitude to learn other database tools and concepts
- Commitment to working with a diverse and inclusive community

Preferred:

6. Environmental and Physical Demands: (Please describe the work environment and unusual physical demands, i.e. lifting requirements.)

Office environment. Lift, carry, push and pull 10 lbs. Visual – normal concentration. Repetitive motions including fingers, hands and wrists.

Travel of behalf of the College to participate in manager meetings and conferences will also be required, expectation is that travel may comprise up to 30% of the analyst's time. Travel typically increases with tenure and experience, as the analyst will take on more investment manager diligence and monitoring responsibilities.

7. Decision Making:

The Investment Analyst's authority is in support of implementing decisions voted by the Investment Committee and as directed by the Chief Investment Officer.

8. Supervision Exercised/Received:

While this position does not have direct supervisory responsibilities, as an Analyst remains on the Investment Office team they will be expected to mentor analysts that join the team subsequent to them.

Supervisory Responsibility: Yes _____ No x _____

Number of Employees Supervised: _____

