

## **POSITION: INVESTMENT ANALYST**

### **REPORTS TO: DIRECTOR OF FINANCE**

#### **POSITION SUMMARY:**

The Investment Analyst reports to the Director of Finance and assists in the day-to-day monitoring, reporting, and analysis of external investment managers. The Investment Analyst is responsible for relationship management related to investment managers, investment consultants, and social finance. The Analyst is responsible for reporting to the Investment Committee and performing investment industry related trends analysis. The Investment Analyst will work closely with the other members of the finance team on a variety of investment, finance, and treasury related projects.

#### **SPECIFIC AREAS OF RESPONSIBILITY:**

- Relationship management with investment managers, and investment consultant
- Compliance management related to investments
- Performance monitoring of investment managers
- Creation of annual Due Diligence Report and other relevant research/analytical reports
- Responsible for social/responsible investment relationships and the monitoring of social finance and other related investment trends

#### ***Research and Analysis***

- Conduct analysis related to Foundation Spending Policy, cost ratio analysis, and other relevant analysis
- Conduct research related to trends in investments and social finance and other analysis as it relates to investments of endowment portfolios
- Develop print and web content to be used in Foundation communications related to investments and social finance

#### ***Performance and Compliance Monitoring***

- Assistance in monitoring on going performance of investment managers
- Preparation of performance analysis, compliance reporting and reports for investment committee
- Work closely with the Director of Finance to continuously improve quality, timelines, and accuracy of reporting to all stakeholders of The Winnipeg Foundation

#### ***Administration***

- Assists in preparing for Investment Committee Meetings including scheduling and the preparation of meeting packages
- Attendance at Investment Committee meetings and preparation of minutes
- Monitors investment asset allocation and facilitates rebalancing on a quarterly basis

- Assists with other related treasury functions
- Supports relationships with donors and community foundation colleagues when investment related knowledge is an asset

### **EDUCATION**

This position requires an MBA or Mfin degree with a focus in finance, or a related discipline. Advanced proficiency in excel and database usage is expected, along with strong written and verbal communication skills.

### **CREDENTIALS**

The incumbent is expected to have a CFA designation or be close to obtaining a CFA designation.

### **EXPERIENCE**

This position requires 2-5 years experience in an investment or finance related role.

### **COMMUNITY KNOWLEDGE**

Community knowledge will grow with experience in the job. It is an asset but not prerequisite.

### **DECISION MAKING/INDEPENDENCE OF ACTION**

The Investment Analyst is expected to be able to manage a variety of non-routine projects with minimal guidance and develop alternative solutions, ideas by taking a proactive approach to projects.

### **ANALYTICAL THINKING AND PROBLEM SOLVING**

This role requires strong analytical skills, advanced excel skills, and a high level of comfort with statistical and investment concepts.

### **LEADERSHIP/INITIATIVE**

The Analyst is expected to take a leadership role in the area of investments. This includes bringing issues related to investments, to the attention of management.

### **CONTACTS/RELATIONSHIPS**

This position is in regular contact with investment managers, both current and prospects, investment consultant, finance and other professional contacts considered relevant to this position.

### **SUPERVISORY AND ADVISORY RESPONSIBILITIES**

This position does not have any supervisory responsibilities. It is expected that an advisory capacity related to investments will grow with progression in the role.