Job Opportunity Posting

Posting Date: 3/1/2022
Removal Date: 3/22/2022
Title: Investment Analyst
Grade: 21 Exempt
Department: Trust
Preferred Location: Jeffersonville / Louisville Metro
Posting Number: HR 22-3-03

Position Summary
This position will assist the Director of Investments with all phases of portfolio management, including entering securities trades into recordkeeping systems, monitoring security positions, monitoring asset allocations, gathering economic and capital markets information (both equity and fixed income data), participate in asset allocation strategy development, monitor and initiate asset allocation rebalancing, strategic and tactical asset allocation changes, monitoring asset class, sub-asset classes, and securities. Following an appropriate training period, this position will also include interacting with and presenting to clients.

Scope & Breadth of Position
This position reports to the Director, Investments & Portfolio Management Services and has no direct reports.

Accountabilities
Monitoring, maintenance, documentation, execution and compliance with all regulatory requirements associated with Trust Department portfolio management, securities trading, and portfolio recordkeeping.

Major Duties and Responsibilities
- Monitor economic and capital market data for inclusion in NCTC’s economic assessment
- Participate in the development and implementation of asset allocation changes, both strategic and tactical
- Participate with other team members on the development and capture of client Investment Policy Statements
- Monitor Investment Policy Statement compliance
- After appropriate training, enter, and monitor security trades and settlements
- Monitor asset allocation positions, including class, sub-asset class, security, and cash level exposures
- Monitor and report on security positions, securities ratings, and any changes requiring attention or action
- Research and development on emerging ESG, socially responsible, and values-based investing topics
- Act as liaison to third parties including custodians, transfer agents, or fund managers.

Following an appropriate training and development period, incumbent will be expected to communicate directly with clients regarding any portfolio management issue, including economic conditions, investment policy issues, asset allocation strategies, and investment philosophy.

When incumbent shows appropriate portfolio management growth and communication skills, incumbent will be expected to travel independently to visit and communicate with clients regarding investment management of their assets. The anticipated amount of travel at some time in the future could approach ten (10%) percent.

Relationships
Will work in a team setting and participate with Financial Planners and Trust Officers to deliver high-quality service to clients.

Experience and Job-Related Requirements
Bachelor's Degree required, one of the following fields of study preferred:
- Economics
Preferred 3-7 years’ experience in financial services, securities processing, or previous experience in portfolio management.

Preferably hold or working toward obtaining an industry certification such as:
- Chartered Financial Analyst, CFA
- Certified Financial Planner, CFP®
- Certified Investment Management Analysts, CIMA

Familiarity with macro-economics, capital markets, and investment management preferred.

An interest in values-based/ESG investing or impact investing is preferred.

An ability and interest in interacting with clients, presenting, and building relationships is preferred. An ability and interest in communicating complex financial topics to clients in easy to understand ways is preferred.

An ability and interest in building and maintaining advanced quantitative models and reporting in Microsoft Excel and other systems is preferred.

**Physical Requirements**
- Ability to communicate orally with management and co-workers, both individually and in a group/team.
- No heavy lifting is expected. Exertion of up to 10 pounds of force occasionally may be required.
- Regular use of the telephone and e-mail for communication is essential.
- Sitting for extended periods is common with extensive work at a computer monitor and/or calculator.
- Hearing and vision within normal ranges is essential for normal conversations to receive ordinary information and to prepare or inspect documents.
- Good manual dexterity for the use of common office equipment such as computer terminals, calculator, telephone, and copiers.

**Work Environment**
Job is performed indoors in a traditional office setting.
Expect the work environment to change after an appropriate period of growth and experience to include air travel at a level of up to 10% of time.

Forward resume to Lisa Pesavento
lisa.pesavento@presbyterianfoundation.org
Attn: HR Posting #22-3-03

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