Friends Fiduciary Corporation
Investment Analyst
Position Description

Reports To: Chief Investment Officer
Direct Reports: None
FLSA Status: Exempt, Regular

POSITION SUMMARY: The Investment Analyst (IA) will work with the Chief Investment Officer (CIO) and other staff supporting various aspects of Friends Fiduciary Corporation’s (FFC) investment products and services. The IA will be involved in monthly and quarterly performance reporting, asset allocation reviews and studies, and the ongoing SRI/ESG-related work associated with the organization’s investment services. They will support the organization’s marketing and communications efforts and will interact with FFC’s external investment managers and service providers. They will be called on to communicate the organization’s investment policies, strategies, and performance to current and potential constituents and will support the CIO in the preparation of materials for internal and external meetings.

PRIMARY JOB FUNCTIONS:
- Assist CIO with oversight of investment funds, including asset allocation reviews, performance analysis, attribution analysis, and ongoing due diligence of external managers.
- Reconcile monthly performance between external investment manager reports and FFC’s performance measurement group.
- Assist with SRI/ESG screening methodology and the review of potential new equity and fixed income holdings.
- Prepare quarterly holdings lists for internal and external dissemination.
- Assist with monthly and quarterly updating of marketing materials and factsheets.
- Distill and communicate information received from external managers through in-person meetings and written reports.
- Conduct research on investment managers for inclusion in FFC’s approved list.
- Assist with research and development of new investments and products.
- Support business development efforts including market research, preparation of presentation materials, and RFP responses as needed.
- Assist with FFC’s UN Principles for Responsible Investment (PRI) reporting.
- Periodically generate peer group comparisons with relevant benchmarks.
- Perform other duties and responsibilities as assigned.
MINIMUM SKILLS/REQUIREMENTS:

- Broad knowledge of capital markets, asset classes, and investments.
- Courteous, efficient, and professional manner.
- Ability to plan, organize, and prioritize projects in collaboration with team members to meet deadlines in a multi-tasking, fast-paced environment.
- Possess strong financial, quantitative, and analytic skills to assist with the day-to-day oversight of FFC’s funds and external investment managers.
- Excellent writing, oral communication, and interpersonal skills.
- Proficiency with MS Office Suite (Excel, Word, PowerPoint) and experience with databases.
- Familiarity with Bloomberg and CRM databases are preferred.
- Commitment to delivering a positive customer service experience.
- Ability to maintain confidentiality and discretion.
- Careful attention to detail.

EXPERIENCE/EDUCATIONAL REQUIREMENTS:

- Bachelor’s degree from an accredited college or university.
- 1-3 years’ professional experience in an investment-related capacity is preferred.
- Progress towards the CFA designation is preferred.
- Other academic degrees or professional designations will be considered in the context of the applicant’s credentials.
- Ability to attain industry qualifications (i.e. Series 65 or 7) as needed.

At Friends Fiduciary we strive to build a work culture where all employees can contribute their very best and work effectively together without regard to race, ethnicity, physical ability, sexual orientation, religion, gender, and job position or education level.