UNIVERSITY OF SOUTHERN CALIFORNIA

Investment Officer

Job Code: 113823

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Grade: N
OT Eligible: No
Comp Approval: 4/24/2011

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JOB SUMMARY:
Assists the Chief Investment Officer and senior staff in managing the university's endowment portfolios and its investment managers. Assists in the origination and management of all asset classes as determined by the Chief Investment Officer. Conducts the necessary due diligence on alternative asset or investment managers, derives conclusions and recommends managers for hire.

JOB ACCOUNTABILITIES:

*E/M/NA  % TIME

Identifies, originates and conducts due diligence on prospective managers.  
Oversees and manages existing investments in various asset classes.  
Recommends approval or denial of new investments, including the preparation of investment memorandums.  
Researches new asset classes to determine whether they should be included in the endowment.  
Conducts research for new investments.  
Develops and sustains relationships with peers, investment managers and potential investment managers. Keeps abreast of new managers of interest.  
Performs preliminary and advanced work for the selection of potential investment managers. Participates in reviewing, interviewing and hiring investment managers.  
Researches and analyzes various asset categories and investment vehicles to determine suitability for investment by the university. Participates in the determination of overall investment strategy.  
Interacts with other areas of the university (e.g., Office of the Senior Vice President, Administration; Development Office; General Counsel; Restricted Fund Accounting, etc.).
Performs other related duties as assigned or requested. The University reserves the right to add or change duties at any time.

*Select E (ESSENTIAL), M (MARGINAL) or NA (NON-APPLICABLE) to denote importance of each job function to position.

EMERGENCY RESPONSE/RECOVERY:

Essential: ☐ No
In the event of an emergency, the employee holding this position is required to "report to duty" in accordance with the university's Emergency Operations Plan and/or the employee's department's emergency response and/or recovery plans. Familiarity with those plans and regular training to implement those plans is required. During or immediately following an emergency, the employee will be notified to assist in the emergency response efforts, and mobilize other staff members if needed.

**JOB QUALIFICATIONS:**

**Minimum Education:**
- Bachelor's degree

**Minimum Experience:**
- 5 years

**Minimum Field of Expertise:**
- Must have comprehensive understanding of the capital markets, investment theory and be able to apply knowledge to the development of portfolio management strategies.

**Preferred Education:**
- MBA and/or CFA

**Preferred Field of Expertise:**
- Experience at another endowment/foundation, pension fund, consultant or fund of funds.

**Skills: Other:**
- Analysis
- Assessment/evaluation
- Communication -- written and oral skills
- Interpretation of policies/analyses/trends/etc.
- Interviewing
- Knowledge of applicable laws/policies/principles/etc.
- Managerial skills
- Organization
- Planning
- Problem identification and resolution
- Research
- Statistical analysis

**Skills: Machine/Equipment:**
- Calculator
- Computer network (department or school)
- Computer network (university)
- Fax
- Personal computer
- Photocopier
Supervises: Level:

May oversee student, temporary and/or casual workers.

SIGNATURES:

Employee: ___________________________ Date: ___________________________

Supervisor: __________________________ Date: ___________________________

The above statements are intended to describe the general nature and level of work being performed. They are not intended to be construed as an exhaustive list of all responsibilities, duties and skills required of personnel so classified.

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