UNIVERSITY OF SOUTHERN CALIFORNIA
Managing Director - Investment Office
Job Code: 199159

Grade: 00
OT Eligible: No
Comp Approval: 5/9/2011

JOB SUMMARY:
Has responsibility for managing the university’s internal endowment portfolios and its investment managers, and other aspects related to the investment of the university’s financial assets.

JOB ACCOUNTABILITIES:

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

**E/M/NA** % TIME

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Develops and recommends to the Investment Committee on overall asset class investment strategy. Monitors adherence to the Investment Policy Statement and the manager’s Investment Guidelines. Recommends changes as appropriate.

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Researches and analyzes other asset categories and investment vehicles to determine suitability for investment by the university. Work with Chief Investment Officer in conducting asset allocation studies. Participates in the determination of overall investment strategy for all portfolios.

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Reviews and analyzes all investment activity and performance in all accounts under external and internal management on a monthly or quarterly basis, as required.

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Interacts effectively with other areas of the university (e.g. Office of the Senior Vice President, Finance and Chief Financial Officer; Office of University Advancement; General Counsel; Restricted Fund Accounting, etc.)

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Makes buy/sell decisions for and ensures the proper recording of gifts received from donors. Ensures university compliance with SEC rulings on all gifts of restricted securities.

Performs other related duties as assigned or requested. The university reserves the right to add or change duties at any time.

EMERGENCY RESPONSE/RECOVERY:

Essential: ☐ No ☐ Yes

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:

10 years

Minimum Field of Expertise:

Directly related experience in the field. Must have comprehensive understanding of capital markets, investment theory and be able to apply that knowledge to development of portfolio management strategies. Demonstrated interpersonal, organizational, critical thinking and oral and written communication skills.

Preferred Education:

Master's degree

Preferred Experience:

15 years

Preferred Field of Expertise:

Chartered Financial Analyst (CFA) designation or enrollment in the CFA program. Experience with both public and private markets is desirable.

Skills: Other:

Analysis
Assessment/evaluation
Communication -- written and oral skills
Consulting
Counseling
Customer service
Interpretation of policies/analyses/trends/etc.
Knowledge of applicable laws/policies/principles/etc.
Negotiation
Networking
Organization
Planning
Problem identification and resolution
Project management
Research
Scheduling

Skills: Machine/Equipment:

Calculator
Computer network (department or school)
Computer network (university)
Computer peripheral equipment
Fax
Personal computer
Photocopier

Supervises: Level:
May oversee student, temporary and/or resource 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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