



JOB INFORMATION

Job Code:	113827
Job Title:	Investment Analyst
FLSA Status:	Exempt
Supervisory:	May oversee student, temporary and/or resource workers.
Job Family:	Investments
Job Family Group:	Accounting, Finance and Banking
Management Level:	7 Individual Contributor

JOB SUMMARY

Manages the securities related gifting program. Assists senior staff in the management of investment activities.

JOB QUALIFICATIONS:

Education

Req	Pref	Degree	Field of Study
X		Bachelor's degree	
	X	Master's degree	

Additional Education

Check here if experience may substitute for some of the above education.

Combined experience/education as substitute for minimum education

Work Experience

Req	Pref	Work Experience	Experience Level
X		<1 year	

Additional Work Experience

Check here if education may substitute for some of the above work experience.

Combined experience/education as substitute for minimum work experience

Knowledge, Skills and Abilities

Req	Pref	Functional Skills
X		Finance, brokerage, investment management and/or accounting experience. Good understanding of the capital markets and investment concepts. Knowledge of financial and investment systems. Demonstrated strong analytical and problem solving skills. Advanced proficiency in Microsoft Excel and proficiency in Microsoft Work, Outlook and Access. Demonstrated excellent written and verbal communication skills. Requires a self-motivated team player who is customer service oriented.
	X	CFA or CFA candidate. Master's Degree in business administration or related field.

Other Job Factors

JOB ACCOUNTABILITIES

	<i>% Time</i>	<i>Essential</i>	<i>Marginal</i>	<i>N/A</i>
Collects, calculates, and analyzes statistical information on investment pools.				
Performs preliminary and analytical work for the selection of potential investment managers. Provides research to senior staff in support of investment action being evaluated by the Investment Office. May conduct research for new investments.				
Manages the securities related gifting program. Analyzes data and provides reports to senior management. Assures that securities are properly registered into the university's name, recorded, and promptly sold to avoid financial loss to the university.				
Manages the securities related gifting program. Analyzes data and provides reports to senior management. Assures that securities are properly registered into the university's name, recorded, and promptly sold to avoid financial loss to the university. Builds relationships with university development officers and brokers. Serves as a resource to provide requested or required gift information. Creates and maintains policies and procedure materials to aid in the gift giving process. Creates contents for and maintains web site information to streamline the gift giving process.				
Calculates, evaluates, and analyzes the performance of Endowment Pool investment managers, Endowment Pool composites, and other university endowment or trusts. Maintains performance databases. Recommends database enhancements to assist in reporting and analysis.				
Works with the university's custodian to assure that custodian statements reconcile to investment manager records. Identifies, researches and resolves problems in a proactive manner and adjusts accordingly. Collects information contained in custodian statements, manager statements, and other sources and records into various spreadsheets. Reviews spreadsheets prior to distribution to Investment Office and Restricted Fund Accounting personnel for accuracy. Ensures supporting documentation exists for audit purposes.				
Maintains files for alternative investments (quarterly and annual reports, K-1's, 1099's, legal documents, correspondence). Maintains market value database, and records distributions associated with alternative investments. Analyzes market value and distribution data for trends and reports to senior staff. Oversees the wiring of funds as related to investments				
Assists the Chief Investment Officer on asset allocation, rebalancing and liquidity analysis.				
Works with the Risk Officer to analyze risk metrics for various investment strategies and collectively for the endowment.				

Other Requirements

<i>Essential:</i>	<i>Emergency Response/Recovery</i>	<i>Essential:</i>	<i>Mandated Reporter</i>
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.	No	A mandated reporter who in his or her professional capacity has knowledge of, or reasonably suspects a person who is under the age of 18 years, elderly, or a dependent adult has been the victim of abuse or neglect must report the suspected incident. The reporter must contact a designated agency immediately or as soon as practically possible by telephone or in writing within 36 hours. By virtue of the associated job duties, this position qualifies as a mandated reporter as required by state law and USC's policy at: https://policy.usc.edu/mandated-reporters/
<i>Campus Security Authority (CSA)</i>			<i>Essential:</i>
By virtue of the associated job duties, this position qualifies as a Campus Security Authority as required by law and USC's policy at: https://dps.usc.edu/alerts/clery/			No

ACKNOWLEDGMENTS

The above statements reflect the essential and non-essential functions as necessary to describe the principle contents of the job. They are not intended to be a complete statement of all work requirements or duties that may be required of the position. I understand that I may be asked to perform other duties as assigned. USC reserves the right to add or change duties

at any time.

The University of Southern California is an Equal Opportunity Employer. USC prohibits discrimination on any basis protected under federal, state, or local law, regulation, or ordinance or university policies. All employment decisions are based on individual qualifications and business need.

I acknowledge receipt of this job description and its associated physical requirements. I have read and understand the job description and job requirements and agree to abide by their contents. I realize that duties may be requested of me that are not specifically stated herein. I understand that I will be expected to adjust to potential fluctuations in work volume. I understand that, if I have any questions about the essential functions or expectations of my position, my supervisor and/or HR partner are available to discuss them with me.

Print Employee Name

Signature

Date

Print Manager Name

Signature

Date

This job description describes the general nature and level of work required by the position. It is not intended to be an all-inclusive list of qualifications, skills, duties, responsibilities or working conditions of the job. The job description is subject to change with or without notice, and Management reserves the right to add, modify or remove any qualification or duty. Nothing in this job description changes the existing at-will employment relationship between the university and the employee occupying the position.