



USC University of Southern California

Investment Associate Job Description

JOB INFORMATION

<i>Job Code:</i>	113803
<i>Job Title:</i>	Investment Associate
<i>FLSA Status:</i>	Exempt
<i>Supervisory:</i>	May oversee student, temporary and/or resource workers.
<i>Job Family:</i>	Investments
<i>Job Family Group:</i>	Accounting, Finance and Banking
<i>Management Level:</i>	7 Individual Contributor

JOB SUMMARY

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

JOB QUALIFICATIONS:

Education

<i>Req</i>	<i>Pref</i>	<i>Degree</i>	<i>Field of Study</i>	
X		Bachelor's degree		
	X	Master's degree	Business Administration	Or
	X	Master's degree	in related field(s)	

Additional Education

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

Combined experience/education as substitute for minimum education

Work Experience

<i>Req</i>	<i>Pref</i>	<i>Work Experience</i>	<i>Experience Level</i>
X		3 years	

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

<i>Req</i>	<i>Pref</i>	<i>Functional Skills</i>
X		Finance, brokerage, investment management and/or accounting experience.
X		Good understanding of the capital markets and investment concepts.
X		Knowledge of financial and investment systems.
X		Ability to work independently on projects in a fast paced environment.
X		Demonstrated strong analytical and problem solving skills.
X		Advanced proficiency in Microsoft Excel and proficiency in Microsoft Work, Outlook and Access.

Knowledge, Skills and Abilities

Req	Pref	Functional Skills
X		Demonstrated excellent written and verbal communication skills.
X		Self-motivated team player who is customer service oriented.

Other Job Factors

JOB ACCOUNTABILITIES

	% Time	Essential	Marginal	N/A
Evaluates and analyzes the performance of investment managers and asset class composites for the Endowment and other University programs.				
Collects, calculates and analyzes statistical information on investments managers.				
Assists the Chief Investment Officer on asset allocation, rebalancing and liquidity analysis.				
Provides investment research to the senior staff in support of investment action taken by the Investment Office.				
Performs preliminary and advanced work for the selection of potential investment managers.				
Participates in reviewing, interviewing and hiring investment managers.				
Works with Risk Officer to analyze risk metrics for various investment strategies and collectively for the Endowment.				
Maintains performance databases. Recommends database enhancements to assist in reporting and analysis.				
Maintains market value and cash flow database associated with private investments.				
Communicate to senior staff key developments in private market partnership holdings.				

Other Requirements

Essential:	Emergency Response/Recovery	Essential:	Mandated Reporter
	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.		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/
Campus Security Authority (CSA)			Essential:
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.