



INVESTMENT ASSOCIATE OPENING JOB DESCRIPTION – 2021

Angeles Investments is a multi-asset investment firm founded to provide sophisticated, customized, global investment solutions to institutional and private wealth clients. Employee-owned since its founding in 2001 with offices in Santa Monica, CA and New York, Angeles oversees approximately \$6.6 billion in full discretionary assets as well as \$33.1 billion in non-discretionary assets. Angeles' expertise includes investment research, asset allocation, investment policy development, portfolio structure, manager research & selection, and risk management. More information is available on our website at www.angelesinvestments.com.

PLEASE BE SURE TO INCLUDE RESPONSES TO THE FOUR QUESTIONS BELOW IN YOUR COVER LETTER AND COMBINE COVER LETTER AND RESUME INTO ONE FILE.

- 1. Angeles is committed to diversity within our organization. How has diversity played a part in your personal or professional development?**
- 2. Why are you interested in working at Angeles Investments?**
- 3. What is the most important quality you are looking for in your new position?**
- 4. What attracts you to working with institutional investors as opposed to high-net-worth individuals.**

Angeles seeks a person to work side-by-side with the firm's senior investment professionals in overseeing, directing, and reporting on all aspects of a client relationship and a client's investment portfolio. The Investment Associate's primary responsibility is to provide support to our Investment Officers on all aspects of client service. The Investment Associate will also conduct manager and capital market research supporting our research team and Investment Officers.

RESPONSIBILITIES INCLUDE:

- **Client Support:** Work closely with the firm's Investment Officers on all aspects of client relationships, including review of performance reporting, preparation of investment strategy recommendations and educational presentations, as well as special projects.
- **Client Meetings:** Prepare Investment Officers for client meetings, participate in client meetings in conjunction with an Investment Officer, and provide meeting follow-up support.
- **Asset Allocation:** Prepare asset allocation studies and investment portfolio structure analysis for clients. Lead annual and bi-annual review of Angeles' long-term capital market assumptions. Work with Investment Officers to provide customized asset allocation analysis for clients and assist in drafting investment policy statements.
- **Manager Research:** Research investment managers for inclusion in client portfolios and manager monitoring. Coverage includes traditional and alternative managers (i.e. hedge funds, private equity).
- **ESG-related Support:** Work with our team to improve our qualitative/quantitative assessments of managers and products' environmental, social and governance (ESG) integration into investment processes and managers' diversity and inclusion practices. Work with our team to engage and provide feedback to managers on ESG/DEI best practices. Assist manager research team members in sourcing ESG and impact funds.



- **Special Projects:** Work with the broader Angeles' team to improve efficiencies by expanding system capabilities (Salesforce & Bloomberg) and enhance internal processes.
- **Business Development:** Support client service and business development efforts as needed, including assisting with the preparation of finals presentations and RFPs, as well as participating in new business meetings.

QUALIFICATIONS:

Five years plus work experience in finance- or investment-related capacity. MBA, and/or CFA (or progress towards) preferred. Strong verbal, writing, and quantitative analysis skills are required, as well as facility with Word, PowerPoint and Excel. Knowledge of Salesforce is a plus. Candidates must be detailed-oriented, able to take initiative, and capable of prioritizing and handling multiple assignments simultaneously.

COMPENSATION:

Salary based on experience. Health and profit-sharing benefits, CFA expense reimbursement, and annual discretionary bonus included.

PROCESS:

Interested parties should send a resume and cover letter (both required) outlining how you meet the requirements stated herein and your experience in carrying out the responsibilities listed above to jobs@angelesinvestments.com.