



# Canterbury Consulting

## Job Posting—Investment Analyst

### About Canterbury Consulting

Canterbury Consulting, Inc. ("Canterbury") is a 60 person professional services firm that provides investment advice to a broad set of clients with net assets ranging from \$10M to \$2B. Clients are both tax-exempt - public and private foundations, endowments and pension plans - and taxable - corporate plans and high net worth and ultra-high net worth individuals and families - and invest in both traditional assets such as public equities and bonds and alternative assets such as private capital, hedge funds and real assets (commodities, real estate, etc.). Canterbury customizes each client's portfolio based on his or her needs, wants, risk preferences and liquidity requirements. The average tenure of Canterbury's clients is 10+ years.

### Investment Analyst at Canterbury Consulting

When you join Canterbury as an Investment Analyst, you will be exposed to all aspects of the institutional investment industry. You will have a direct impact on the investment success of foundations, endowments, and families through your work on asset allocation, manager selection, investment analytics, performance reporting, and investment execution. On every task, you will look at decisions from the investor's perspective. You will learn how to ask the right questions, find the right answers, and then use quantitative and qualitative frameworks to develop solutions for our clients. Starting on your first day at Canterbury Consulting, you will be an integral part of the process in helping clients achieve investment success.

The Investment Analyst position at Canterbury is a challenging and rewarding role for the right individual. Our most successful Investment Analysts have these characteristics:

- Intellectual curiosity and a strong interest in the financial markets
- An extremely high level of attention to detail and quality
- The ability to multi-task, balance competing priorities, and meet deadlines
- Excellent written and oral communication skills
- Strong analytical ability
- Completion of a four-year degree in Finance or related field.

The primary responsibilities of Investment Analysts are to...

- Collaborate with senior investment consultants on the production of client deliverables such as performance reports, asset allocation studies, investment manager searches, and portfolio analyses
- Act as the primary contact person for client staff members and ensure that client requests are completed in a timely and accurate manner

At Canterbury, we expect our Investment Analysts to learn at a fast pace in a demanding environment, and to take advantage of the many opportunities to grow professionally. In addition to your hands-on daily work, you will have the opportunity to pursue the CFA Charter, join in internal investment committee and investment manager due diligence meetings as well as attend formal training sessions designed to bolster your knowledge of the investment landscape.

Investment Analysts who perform well and show outstanding promise can be promoted to Senior



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Investment Analyst. As a Senior Investment Analyst, you will take on greater responsibility in the mentoring and training of new Investment Analysts while continuing to directly impact client success.

Please contact: [careers@canterburyconsulting.com](mailto:careers@canterburyconsulting.com)

Website: [www.canterburyconsulting.com](http://www.canterburyconsulting.com)

Canterbury Consulting is located in Newport Beach, CA