



## **Performance Reporting/Analytics Supervisor**

Angeles Investment Advisors, LLC is an employee-owned investment advisory firm based in Santa Monica, CA. Angeles provides investment management and advisory services to institutional clients (e.g., endowments, foundations, pension plans, and select high net worth clients). 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](http://www.angelesinvestments.com).

Angeles is seeking a qualified individual for the role of Performance Reporting/Analytics Supervisor. In this role, the primary responsibility is to oversee and supervise all client performance reporting.

### **Responsibilities:**

- Direct and manage the preparation of all client performance material- with monthly and quarterly deliverables
- Review all client and internal fund performance material, ensuring 1) accuracy and 2) adherence to reporting principles and practices are met
- Assist with accounting, operations, and SEC regulatory compliances processes
- Assist Operations and Compliance departments with completion of annual GIPS
- Support appropriate departments with ad-hoc performance data requests- including marketing material and proprietary fund reporting
- Collaborate with performance team to identify new efficiencies and improved processes for current workflows
- Oversee and provide guidance on initial client onboarding/offboarding to performance system

This person will also have the opportunity to move into a more diverse role after exhibiting the requisite qualifications in the performance reporting responsibilities above. After gaining the requisite firm knowledge, this person can expect to initiate and lead process improvement projects in various operational and reporting areas across the firm.

### **Requirements:**

- Experience with managing a team and providing guidance.
- 3+ years of performance measurement and reporting experience in investment industry
- Solid understanding of creating and interpreting performance reports for client portfolios, including public and private investments
- Acute attention to detail
- Ability to think independently and make decisions for an entire team
- High level of comfort with data sets, numbers, and analysis
- Ability to quickly adapt to changes in processes and procedures
- Ability to work on multiple projects at one time
- Strong quantitative, analytical, communication skills
- Highly proficient skills with Excel, PowerPoint, Word
- Investment software experience (Morningstar Direct, Bloomberg, Burgiss, InvestorForce, Addepar) is a plus
- 2+ years of auditing experience is a plus

### **Compensation & Benefits:**

- Salary based on experience – range \$120K to \$150K
- 401(k) retirement savings plan with employer match
- Flexible work arrangements – hybrid work environment
- PTO plus volunteer time-off
- CFA and educational expense reimbursement



**Process:**

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