



Canterbury Consulting

Job Description—Senior Manager of Analytics

About Canterbury Consulting

Canterbury Consulting, Inc. ("Canterbury") is a 65+ 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 their needs, wants, risk preferences and liquidity requirements. The average tenure of Canterbury's clients is 10+ years.

Canterbury Consulting was named Fastest Growing RIA Firms by Forbes, Best Places to Work by the Orange County Business Journal in 2020, 2021, 2022 and 2023, and Best Places to Work in Money Management by Pensions & Investments for the last three years.

Key Responsibilities

The Manager of Analytics is responsible for leading the team of Investment Analysts as they partner with Consultants and Consulting Associates to deliver outstanding service to our clients. The Manager of Analytics will be a leader, mentor, diplomat, project manager, and resource who can ensure deliverables are of the highest quality and consistency and are completed within agreed timeframes.

This position is primarily focused on management and operations, rather than portfolio management or finance. This position involves managing the team, partnering with internal clients, monitoring internal processes, setting priorities, developing and clarifying policies and procedures, hiring and training, resource allocation, and ensuring the Investment Analysts are delivering quality and timely materials and service to their internal and external clients.

The team of Investment Analysts directly supports our investment consultants and serves as the day-to-day contact for client staff. Investment Analysts analyze, implement, and maintain client portfolios and assist the consultants in providing specific strategies and recommendations to the client. Our team of Investment Analysts are expected to be self-motivated, responsive, organized, highly detail-oriented professionals who can take ownership of client deliverables and requests, as well as operational issues and see them through to completion. The Manager of Analytics will be ultimately responsible for ensuring the quality and accuracy of work done by the Investment Analyst team, as well as the recruitment, training and management of the internship program.

Essential Duties:

- Manage the workflow, training, and professional development of the Investment Analytics team. Ensure all output meets the high expectations of internal staff and external clients
- Coordinate process improvement with other departments. Identify opportunities to improve efficiency and quality, and make recommendations to senior management to streamline workflow
- Coordinate closely with other department heads on the delivery of cross-departmental processes. (e.g. client money movement, client billing, etc)



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- Coordinate closely with external service providers to troubleshoot issues, improve efficiency and effectiveness, and leverage services to the greatest extent possible
- Achieve proficiency in all investment software tools used within the firm. Act as a resource to assist staff in resolving non-technical issues with suite of software applications
- Maintain appropriate staff levels; ensure subject matter expertise and appropriate back up. Maintain up to date documentation of key processes
- Collaborate closely with project management team and manage the Investment Analyst resources and priorities for the implementation of new software tools.

Supervisory Responsibilities

- This position has supervisory responsibilities
- Directly supervises the Investment Analysts, Interns, and Investment Services Coordinator. Carries out supervisory responsibilities in accordance with Canterbury's policies and applicable laws. Responsibilities include interviewing, hiring, and training employees; planning, assigning, and directing work; appraising performance; rewarding and disciplining employees; addressing complaints and resolving problems.

Qualifications:

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Education and/or Experience:

Bachelor's degree from four-year College or university; five or more years related experience and/or training; or equivalent combination of education and experience.

Experience with performance reporting systems such as InvestorForce, Paris, and/or Solovis, as well as Morningstar, Bloomberg, and similar tools is highly preferred.

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