



# Canterbury Consulting

Job Posting—Vice President

## Equity Research Associate

### 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 approximately \$10M to over \$1B. 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 13+ years.

### Position Overview

Within investment research, the Vice President ("VP") is expected to be an expert of an asset class and provide leadership developing the investment strategy of Canterbury Consulting ("Firm"). The ideal candidate will be able to effectively conduct manager due diligence and articulate the Firm's investment views through contributions to research reports and other client-facing material or presentations.

A VP must have previous experience sourcing and performing due diligence on a broad range of long only and long/short equity focused strategies. The VP is expected to excel at communicating their findings from due diligence activities internally to colleagues, as well as externally to clients. Due diligence will take the form of phone calls, office visits, conferences, reference checks, annual meetings, etc. The VP is tasked with contributing to sector outlook publications and white papers on portfolio construction, valuation, diligence, and other topics.

### Vice President, Investment Research at Canterbury Consulting

The successful Vice President has the following characteristics:

- Approximately 5-10 years of industry experience, with a proven ability to conduct research analysis and manager due diligence
- Strong writing and presentation skills to effectively articulate investment views
- Ability to work both independently and in a team under tight deadlines
- Desire to progress toward advanced levels of research-related responsibilities
- Experience with the Morningstar Direct platform and Bloomberg Terminal a plus; Enrollment in the CFA and/or CAIA program preferred
- Familiarity with a variety of organizations from experience investing as a manager of managers, fund of funds manager, plan sponsor, consultant or investment advisor. Ability to leverage such experience to contribute in a broad capacity during Research Department or Firm meetings
- Knowledge of investment concepts, strategies, styles, and analytical methodologies
- Strong grasp of global and domestic macro-economic and capital market issues



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- Effective communicator; adjusts to fit the audience and the message; strongly delivers a point of view

The primary responsibilities for this role include:

- Sourcing new opportunities and managing the pipeline process for new opportunities
- Performing and recording due diligence, on a regular basis, of strategies in client portfolios as well as other funds considered best in class
- Make portfolio allocation recommendations based on quantitative and qualitative evidence that supports the Firm's investment philosophy
- Analyze market trends and report on the equity industry
- Diligence and provide recommendations regarding personnel changes, changes to investor terms, and other unforeseen issues
- Participate in meetings to discuss asset class specific insights and manager specific issues, and serve in a leadership role on the Equity Committee
- Create insightful investment research and content for the quarterly asset class report, Global Positioning Statement™ ("GPS") and other external content

Education:

- A degree in finance, economics, or a related field
- An advanced degree, and/or CFA, CAIA are highly preferred

At Canterbury, we expect our Vice Presidents to work at a fast pace in a demanding environment, and demonstrate excellent problem solving and interpersonal skills. From your first day on the job, you will be an integral part of the process in helping our clients achieve investment success.

Please send cover letter, relevant work samples, and resume to [careers@canterburyconsulting.com](mailto:careers@canterburyconsulting.com) and reference the position "Vice President, Investment Research" in the subject line. Extra effort and personal touches will be looked upon favorably. All submissions will be kept strictly confidential.

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

Canterbury Consulting is located in Newport Beach, CA and expanding to Phoenix, AZ