



## ADLER MANAGEMENT, L.L.C.

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Position Description: Senior Investment Analyst

### **Organization Background**

Adler Management, L.L.C. is a single-family office that serves three generations of family members, Trusts, and foundations. We provide a variety of services to our clients including investment advisory, research and decision making, and ongoing portfolio management. The Investment Group partners with our clients to ensure successful outcomes for their investment needs and delivers a high level of client service.

### **Position Summary**

The Senior Investment Analyst is a key contributor to the ongoing success of Adler Management's investment program. The role includes investment research responsibilities for Adler's client base of tax-exempt and taxable portfolios. Sourcing, diligence, and monitoring of a range of investment strategies and structures (public and private) are key functions of the position. In addition to proactive investment research, the Senior Investment Analyst contributes to investment strategy, ongoing fund and portfolio management, and reporting/communication with stakeholders.

### **Primary Responsibilities**

#### **Investment Research and Monitoring**

1. Source, diligence, and recommend public and private investments for taxable and tax-exempt clients. Conduct ongoing monitoring and documentation of current investments and select prospective strategies.
2. Conduct investment research across a wide range of investment strategies and structures to meet client needs. Experience investing within private equity, venture capital, credit, public equity and debt, and niche strategies through fund structures and other vehicles is vital to create successful outcomes.
3. Proactively pursue investment opportunities to meet foundation specific investment preferences including program related investments (PRIs), impact investing/values-aligned strategies, and the identification and education of suitable investment solutions.
4. Incorporate research and monitoring activities into repeatable framework for decision making and documentation.

#### **Portfolio Management and Reporting**

1. Monitor investment performance and portfolio positioning relative to Investment Policy Statements (IPS) and other factors, make recommendations for changes as needed.
2. Contribute to the portfolio management activities, grant requirements, and periodic reporting for tax-exempt clients.

3. Contribute to periodic communications and meetings with Adler clients in variety of formats.

### **Support**

1. Support the range of activities and needs of family member, Trust, and foundation clients.
2. Work collaboratively and maintain positive relationships with Adler team members and external stakeholders.
3. Continual learning and improvement within areas relevant to client interests
4. Perform other duties as assigned.

### **Reporting and Collaborative Relationships**

The Senior Investment Analyst reports to and is supervised by the Chief Investment Officer. This position works collaboratively with:

1. Adler Management investment team and staff
2. Adler clients, including foundations, individuals, and trustees
3. Investment partners and service providers

### **Qualifications**

The Senior Investment Analyst must be an experienced professional with a minimum of three to five years of progressively responsible experience in financial analysis and investments. The ideal candidate has demonstrated an ability to research and evaluate various investments to render mature business decisions. The individual must be an effective communicator across a variety of mediums combined with strong analytical skills.

### **Minimum Requirements**

- Bachelor's degree
- CFA or CAIA designation or progress towards is preferred
- Three to five years' experience in an investment setting, analyzing and/or investing in traditional and alternative investments.
- Working knowledge of mission related and program related investment strategies for non-profits is strongly preferred
- Proactive and flexible team player with desire for lifetime learning and application for the benefit of clients.
- Ability to synthesize multiple information sources for the purpose of drawing conclusions and ability to convey ideas effectively.
- Highly developed verbal communication skills that exhibit thoroughness and sensitivity, with an ability to ask thought-provoking questions to determine client needs

**To apply: Submit your resume to [tim.vedder@adlerllc.com](mailto:tim.vedder@adlerllc.com)**