INVESTURE, LLC
CLIENT TEAM ASSOCIATE/ASSOCIATE DIRECTOR

The Company

Based in Charlottesville, Virginia, Investure was founded in 2003 and serves as the outsourced investment office for a select number of endowments and private foundations. Managing assets of approximately $13.5 billion on behalf of 13 client relationships, Investure is responsible for asset allocation, portfolio reporting, and investment/manager selection across a broad range of asset classes, including credit, equities, and alternative investments (hedge funds, private equity, venture capital). Investure is a registered investment adviser.

Job Description

This professional will be a core member of Investure's Client Team reporting to Investure's Chief Operating Officer and will be primarily responsible for providing day-to-day support for client meeting presentations, reporting, and other customized communications for client boards and committees. The successful candidate will be a highly organized, detail-oriented individual with the ability to multi-task and thrive in an ever-changing dynamic environment. The incumbent should have a client service mindset with experience in best practices of client service and communication with a strong interest in serving non-profits. He or she must be able to design, prepare, and deliver high-quality communications that analyze and effectively communicate portfolio information to client boards and committees. An understanding of institutional multi-asset class portfolios and/or a strong desire to learn and understand these portfolios (coupled with strong analytical skills) is required.

Responsibilities and title will ultimately be commensurate with the professional's experience and demonstrated faculties and judgment.

Essential Functions

PRESENTATIONS & REPORTING

- Efficiently manage development of client materials s from concept to final approvals for senior management; create and support content development of client investment committee and board presentation materials, whether in written communications, PowerPoint, or analytical reports; prepare, edit, and manage ongoing updates and enhancements to these client deliverables;
- Utilize Investure's software tools to extract data as necessary; understand how and where client and portfolio data originates and what drives performance;
- Partner with Reporting & Analytics Team to translate exposures and performance information into board presentations, and written narratives, or other portfolio reporting for client committees, boards, and staff;
- Provide current and prospective clients with due diligence information necessary to understand the firm's business and investment strategies; respond to RFPs, questionnaires, and similar requests;
- Understand compliance considerations and necessary disclosures for outgoing materials/analyses.

INFORMATION MANAGEMENT

- Maintain and utilize internal CRM system, including logging client contacts, pipelines, calendars, client calls, meetings, and other relevant client updates;
- Manage and prepare responses to outstanding client inquires, requests and other follow-up, ensuring timely and accurate responses;
- Ensure clients' portfolios and unique qualities are captured in presentations, analyses and internal CRM system;
- Update data and facts across multiple periodically refreshed documents; use independent judgment to create, design, and improve processes for managing frequent updates of multiple presentations, reports, and other documents for clients;

- Regularly track industry publications and databases for relevant market knowledge, competitive data, and client searches.

GENERAL / OTHER

- Take interest and stay informed of potential and current investments, investment philosophy and process, and macroeconomic events that may affect client portfolios;
- Research and respond to prospective client requests, as needed;
- Assist in planning of client meetings and events and support ad hoc project requests;
- Update and maintain client materials via a Client Portal;
- Closely collaborate with the other members of the Client Team in envisioning and implementing ways to improve client service overall.

Education, Experience & Skills

- Strong academic background and Bachelor's degree required; Bachelor's in finance and/or MBA a plus but not required;
- 5 to 8 years of finance, investment, or related industry (including management consulting) experience strongly preferred;
- Experience preparing presentations to boards, senior management, and/or clients; knowledge of presentation and communication best practices;
- Strong analytic and quantitative skills; must be comfortable working with portfolio data and content;
- Outstanding interpersonal, writing, and presentation creation skills;
- Advanced Excel and PowerPoint capabilities required, especially in creating, maintaining, and formatting board presentations, client pitches, and other client reporting templates; data visualization and data communication a plus;
- Experience with Salesforce and Addepar a plus;
- Strong organizational and time management skills; able to manage competing and evolving deadlines;
- Attention to detail, ability to multitask, and experience with project management;
- Experience collaborating in a multi-disciplinary, diverse and dynamic team;
- Strong work ethic and a genuine passion for excellence;
- Team player with positive attitude and pro-active approach to work;
- High level of maturity and sound judgment;
- Able to handle confidential and sensitive information with a high degree of professionalism.

Guiding Principles

- **Integrity:** Demonstrates unquestioned ethics and credibility. Strives to exemplify the highest ethical standards in both work and personal lives.
- **Excellence:** Has exceptional work ethic. Works both hard and smart. Demonstrates continuous self-evaluation of successes and failures.
- **Service:** Puts the team mission and clients first. Illustrates mission-driven outlook and approach.
- **Stewardship:** Puts long-term interests above short-term goals. Focuses on the greater good.
- **People:** Demonstrates passion and excellent judgment. Treats others with respect, helps when and how needed, and is respectful of the needs of others.
- **Teamwork:** Takes a collaborative and selfless approach. Operates under the "Golden Rule".
- **Humility:** Comfortable with being wrong. Seeks to learn from mistakes. Willing to do anything necessary to get the job done. Treats all as equals.

Competencies

- **Accuracy:** Identifies and corrects mistakes; does not repeat past mistakes; demonstrates strong attention to detail.
- **Team Orientation**: Comfortable taking direction or taking the lead; receptive to feedback.

- **Process Management**: Creative and innovative thinker who can simplify and improve complex procedures.
- **Communication:** Excellent interpersonal skills; professional and diplomatic demeanor.
- **Planning:** Can orchestrate multiple activities at once to accomplish a goal; accurately scopes tasks and projects.
- **Adaptability:** Self-directed learner; effectively and positively embraces and manages change. Doesn't require constant direction.
- **Relationship Management:** Negotiates skillfully in tough situations with both internal and external groups; ability to establish strong rapport across all levels.
- **Expertise**: Has experience and knowledge to oversee a function with a high level of accomplishment; able to successfully direct and guide.
- **Problem Solving**: Strong analytical skills; Seeks input and builds consensus to drive team to desired solution.
- **Judgment**: Demonstrates good decision-making based upon a mixture of analysis, wisdom and experience; considers organizational impact.