NORTH BERKELEY
INVESTMENT PARTNERS
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Portfolio Advisor/Research Analyst
Prepared by North Berkeley Investment Partners

<u>Our Firm:</u> We are a growing, team-oriented investment advisory firm with 225 client relationships and $300M+ client assets under management. Client needs set the stage for our work. Our goals are to help individuals, couples and families feel comfortable and confident in making financial decisions related to their life goals, and to get our clients competitive investment performance while limiting downside risk. North Berkeley is a certified B Corporation, built around stakeholder interests.

<u>This Position:</u> Designed for an experienced investment-focused professional. We need a value-oriented analyst who is well-versed in fundamental analysis and value-oriented portfolio management to oversee our research effort. We also are looking for a person who can hold communication responsibility on investments for a group of North Berkeley clients. <u>We are open to acquiring, in that we may find an established investment professional who has been portfolio-focused and who might want to bring client relationships to our comprehensive planning and investment firm.</u> CFA charterholder or significant progress towards a CFA preferred.

Help us stay organized, informed, and crisp in our investment decision-making and communication with clients and advisors

- Run investment team and investment committee guided by founding partners, run market and portfolio research discussion/collaboration, model portfolio decision-making, and craft client messaging.
- Bring investment philosophy, manager selection, asset allocation and performance into view in client meetings, as Advisor or with other Advisors
- Create appropriate investment review material for Advisors and clients
- Responsible for relationship continuation and development with core fund managers, current and new, and all continuing and all *de novo* fund research
- Update investment models on regular review, and as needed when opportunity or risk presents, on buy and sell side, supervising trading and allocation decisions across portfolios including unique custom client issues that arise
- Draft communication for clients as needed, particularly around trading, portfolio changes, and market review

Help us build out and strengthen our new and established investment areas and opportunities for clients

- Continue to develop and sustain firm point of view on sustainability and impact investing
- Continue to develop and sustain firm point of view on value and how to be the best absolute-return focused, value-oriented investors we can be

Qualifications:

- Bachelor's degree with 3.4 GPA or higher, or equivalent, required
- Minimum two years' buy-side/institutional/investment advisor research analysis and/or portfolio management experience required
- Able to hold their own in due diligence conversations with senior institutional portfolio managers, and to build relationships with them over time
- CFA charterholder or significant progress towards a CFA preferred
- Intrinsic value orientation a must
- Good and open communicator, question-asker, storyteller; ability to communicate complicated things simply
- Excellent writer with a feel for broad narratives and how they weave together
- Proven ability to work successfully under pressure with details and a wide variety of work to prioritize, with a high degree of timeliness and accuracy
- Proven talent and experience at anticipating the needs of others
- Personal maturity and a professional focus
- Impeccable ability to maintain confidentiality
- Team-oriented and outlook that no job is too lowly on which to pitch in
- Passionate about quality
- Proven ability to take initiative
- Must be willing to complete a background check done by a contracted third party and to complete personality type testing using standard tools

Hours: The position is full time, and our office hours are 8-5. Some work hours outside that time and some travel to meet with fund managers, clients, and prospective clients.

Compensation/Benefits:

- Competitive compensation that is a base salary plus incentive; or custom compensation plan will be negotiated if a practice acquisition with existing clients

- Medical, Dental, Long Term Disability, 401k, and Profit Sharing Plan
- Comprehensive financial planning and investment management services like those delivered to clients of the firm

How to Apply:

- Applicants should email a cover letter and resume to Sue Reinhold, Ph.D., at **sue@northberkeleyinvestment.com.** No phone calls, please.
- You can learn more about our firm at www.northberkeleyinvestment.com and at https://www.bcorporation.net/community/north-berkeley-investment-partners