

# FOUNDATION FOR THE CAROLINAS

## JOB DESCRIPTION

Title: AVP, Investments Division/Department: Investments

Reporting To (title): Director of Investments

FLSA Classification:  Exempt  Non-Exempt

Employment Type:  Full Time  Part Time  Intern  Temporary/Contract

## POSITION SUMMARY

The Assistant Vice President, Investments, will partner with the Director of Investments and assist in all aspects of managing and overseeing FFTC's investment platform and providing support to the Philanthropic Advancement team with respect to prospecting and relationship management. This includes monitoring the investment performance and asset allocation of FFTC's standard and custom investment pools and the Alliance Manager investment accounts. This position will work closely with FFTC's investment advisor/outsourced chief investment officer (OCIO), administrator, and other vendors who support FFTC's investment platform.

The position will also serve as primary support and backup for the Director of Investments for all investment reporting functions. At times, the position will also serve as a "public face" of FFTC's investment portfolio and lead for investment reporting. The position will also take a lead role in supporting certain key relationships, including at annual and quarterly meetings as needed.

## DUTIES & RESPONSIBILITIES

- Work with Director of Investments to oversee the management and performance reporting of FFTC's investment portfolios while working closely with FFTC's OCIO and other members of FFTC's team.
- Partner with Director of Investments and Investment Analyst for management and performance reporting of the portfolios, including monitoring asset allocation, making sure assets are invested in accordance with donor recommendations and policy targets, and monitoring the returns of each portfolio, and, as necessary, individual manager returns.
- Oversee quality control of published performance results and valuation processes.
- Monitor capital markets and economic conditions and be able to explain how these economic conditions impact FFTC's portfolios to donors/fundholders.
- Serve in a supporting role for business development activities for FFTC, particularly for FFTC's largest donors and prospective fundholders, in coordination with Director of Investments and members of the FFTC Philanthropic Advancement team. This includes prospective fundholder meetings to explain FFTC's investment platform.
- Assist in preparing proposals and responses to RFPs, responding to questions, and completing the fund opening and new donor onboarding process.
- Work closely with OCIO to provide a high level of service to FFTC's clients and Investment Committee, and other key FFTC affiliates and supporting organizations, including helping prepare reporting and meeting materials.
- Meet with FFTC's clients to present pool performance, attribution, capital market performance,

and answer questions regarding FFTC's investment platform and performance.

- Assist Director of Investments with the Alliance Manager Program including: reporting, benchmark and asset allocation monitoring, advisor relations, marketing materials, database management, semi-annual review meetings.
- Responsible for facilitating training and communication on investments and performance to the relationship management team and other appropriate FFTC staff members.
- Work with FFTC's accounting department to develop internal and external investment reports related to FFTC's Impact Investment portfolio. Internal reporting includes a monthly summary of the Impact Investment portfolio. External reporting is for fundholders who have made specific investments in an Impact Investment (e.g., affordable housing).
- Partner with Director of Investments to increase brand awareness among advisory firms. This includes meeting directly with advisory firms as well as participation in groups such as the Financial Planning Association, Wake Forest Center for Private Business, and Charlotte Estate Planning Council.
- Responsible for ongoing management, maintenance, and review of business processes and business process documentation captured within business process management software. This includes an annual review of specified processes to ensure accuracy of documentation and identification of areas for process improvement.
- Work closely with the Investment Analyst to ensure monthly and quarterly investment reporting is completed in a timely and accurate manner.

*This job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required for the position. Other duties, responsibilities and activities may change or be assigned at any time with or without notice.*

## JOB QUALIFICATIONS

- Bachelor's Degree required; Advanced degree a plus (MBA, J.D., etc.).
- Relevant financial certifications preferred (CIMA, CFA, CAIA, etc.).
- 5-7+ years professional experience in financial and investment services with clearly demonstrated success.
- Proven track record and a career history that demonstrates the ability to succeed in complex operating environments with multiple constituencies.
- Excellent oral and written communications skills.
- Excellent interpersonal relationship skills and experience managing "up" and "across" in cross functional team environments.
- General ability to perform the essential functions and overall physical and mental requirements of this position, including stamina to perform tasks over extended periods and ability to occasionally move about to accomplish tasks or move from one worksite and/or workstation to another.

*Note: Proof of fully authorized vaccinated Covid-19 status and booster are required (or FFTC authorized religious or disability accommodation).*

## POSITION SPECIFIC COMPETENCIES

Select from the following position-specific competencies. Please limit the total number of competencies to 7 or less.

All Employees:  Communication & Interpersonal Skills

Executive Team:  Leadership  Strategic Thinking  Fiscal Stewardship

All Supervisors:  Delegating Responsibility & Empowering Employees  Managing Employee Performance  Ensures Consistent Policies & Practices

General:

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|---|---|--|
| <input type="checkbox"/> Affiliate Management             | <input type="checkbox"/> Budgeting & Cost Awareness     | <input type="checkbox"/> Building Organizational Commitment          |
| <input type="checkbox"/> Building Team Environment        | <input checked="" type="checkbox"/> Client Records      | <input type="checkbox"/> Concern for Employee Satisfaction           |
| <input checked="" type="checkbox"/> Customer Skills       | <input type="checkbox"/> Dependability                  | <input type="checkbox"/> Ensures Proper Training in New Technologies |
| <input type="checkbox"/> Entrepreneurial Orientation      | <input type="checkbox"/> Equipment Skills               | <input checked="" type="checkbox"/> Fund Management                  |
| <input type="checkbox"/> Implementing New Technologies    | <input type="checkbox"/> Initiative                     | <input type="checkbox"/> Innovative Thinking                         |
| <input type="checkbox"/> Job Skills                       | <input type="checkbox"/> Managing Meetings              | <input checked="" type="checkbox"/> Managing Multiple Priorities     |
| <input type="checkbox"/> Meeting Targets                  | <input checked="" type="checkbox"/> Presentation Skills | <input checked="" type="checkbox"/> Product Knowledge                |
| <input type="checkbox"/> Productivity                     | <input type="checkbox"/> Project Management             | <input type="checkbox"/> Quality of Work                             |
| <input type="checkbox"/> Relationship Building/Networking | <input type="checkbox"/> Results Oriented               | <input checked="" type="checkbox"/> Technical Skills                 |
| <input type="checkbox"/> Time Management                  | <input type="checkbox"/> Training & Development         | <input type="checkbox"/> Writing Skills                              |