

JOB DESCRIPTION

Title:	Director of Investments		Division	Division/Department: _Investments		
Reporting To: General Counsel & Senior Vice President						
FLSA Clas	ssification:	x Exempt	Non-Exemp	t		
Employm	nent Type:	x Full Time	Part Time	Intern	Contract	

Position Summary

The Director of Investments for Foundation For The Carolinas (FFTC) will be responsible for portfolio oversight and performance reporting with respect to FFTC's growing investment assets. In this role, the Director will work closely with the external third-party investment consultant/outsourced chief investment officer (OCIO) and FFTC's Investment Committee. The position will monitor the asset allocation of each investment portfolio; review weekly recommendations for rebalancing; analyze the portfolio to ensure published performance results are accurate and held to the highest standards of performance relative to expectations. The position will be the "public face" of FFTC's investment team and portfolio and be a lead member of FFTC's sales, relationship management, and financial support team for all nonprofit accounts at FFTC. The Director, in coordination with the General Counsel, will support the needs of FFTC's Investment Committee and other important FFTC affiliates/supporting organizations and their investment or finance committees, individual donors and other non-profit organizations.

The position will also serve on internal FFTC Retirement Committee to provide investment management expertise and assist the committee in meeting their fiduciary responsibility to participants in the DC and TDA plans.

DUTIES & RESPONSIBILITIES

- Serve as lead investment contact for all FFTC clients and internal partners.
- Oversee the management and performance reporting of FFTC's investment portfolios while working closely with OCIO and other members of FFTC Investments team.
- Responsible 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, the individual manager returns.
- Oversee quality control of published performance results and valuation processes, in adherence with standard investment performance reporting standards.
- Monitor capital markets and economic conditions and be able to explain how these conditions impact portfolio returns.
- Work closely with OCIO in order to provide a high level of service to FFTC's clients and Investment Committee, GCCT's Board of Directors and other key FFTC affiliates/supporting organizations who may require "custom service level" support.
- Coordinate and prepare reporting and other materials for quarterly meetings of FFTC's Investment Committee.
- Meet client's investment reporting requirements for non-standard investments such as custom asset

- allocations, impact investments and custom investment dashboards.
- Oversee FFTC's Alliance Manager program by working closely with the VP Investments & Advisor Partnerships
 and Investment Analyst, both of whom have direct responsibility in managing this program. This includes
 annual review meetings with existing alliance managers, monitoring performance and working with new
 financial institutions seeking approval to participate in FFTC's program. Annually review the Investment
 Policy Statement and, as needed, recommend changes to FFTC's investment committee.
- Serves as FFTC lead for RFP development, submittal and presentations for nonprofit & university endowments.
- Create client-focused performance reporting tools PPT presentations, one-pagers, white papers.
- Provide timely and accurate updates on all investment related information on FFTC's website.
- Manages a 2-person team including the FFTC Investment Analyst and FFTC Board and Relationship Specialist, and also works closely with VP Investments & Advisor Partnerships.
- Participates in Retirement Committee meetings by providing investment management oversight to the DC and TDA plans.

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 strongly preferred (MBA, Law, etc.).
- Professional certification required (e.g., CFA, CPA).
- A minimum of 15+ years professional experience in investment management and a demonstrated ability to clearly present investment portfolio risk/returns and capital market conditions/outlook.
- Excellent communication skills and relationship building ability with a proven track record and a career history that demonstrates the ability to succeed in complex operating environments with multiple constituencies.
- Strong organizational and time management skills.
- Solid research, analytical and strategic planning skills.
- Excellent interpersonal, communication and presentation skills, both oral and written.
- Proficiency in Microsoft Office.
- 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

<u>Note:</u> 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 10 or less. All Employees: x Communication & Interpersonal Skills						
Executive Team:	Leadership	Strategic Thinking	Fiscal Stewardship			
All Supervisors:	X Delegating Responsibility & Empowering Employees	X Managing Employee Performance	X Ensures Consistent Policies & Practices			

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