

FOUNDATION FOR THE CAROLINAS

JOB DESCRIPTION

Title: Director of Investments Division/Department: Investments

Reporting To: General Counsel & Senior Vice President

FLSA Classification: Exempt Non-Exempt

Employment Type: 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

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 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 checked="" type="checkbox"/> Relationship Building/Networking | <input type="checkbox"/> Results Oriented | <input type="checkbox"/> Technical Skills |
| <input type="checkbox"/> Time Management | <input type="checkbox"/> Training & Development | <input checked="" type="checkbox"/> Writing Skills |