



January 2019 Job Bulletin

Summary

These employers have shared the following job opportunities with our membership. Please refer to full job descriptions on the following pages. Please reference WIIIN when replying to these postings, and best of luck to you in your job search!

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January 2019 Job Bulletin

CalPERS

Private Equity, Managing
Investment Director

Sacramento, CA

Department Information:

California Public Employees' Retirement System (CalPERS) is a global institutional investor and the nation's largest public pension fund, with assets of approximately \$359 billion as of 08/03/2018. Headquartered in downtown Sacramento, CalPERS is situated in close proximity to the Napa Valley, San Francisco, Lake Tahoe, and other desirable destinations in California. Our people are deeply committed to our core values and their decisions and actions are guided by our investment beliefs. If you thrive in a fast paced, challenging and rewarding environment where diversity in perspective and experience is valued, this may be the right opportunity for you.

Job Description:

Our Investment Office is currently seeking a Managing Investment Director in Private Equity to provide leadership and management direction to CalPERS team, external advisors and consultants responsible for private equity and other investments, and drive our CalPERS mission.

Duties:

- Serve as a member of the CalPERS Investment Office Executive Team, which is responsible for overall risk management, investment performance, financial management, strategy/resource allocation and talent management
- Develop and manage the allocation of investment strategies and policies with respect to strategic partnership, co-investment and direct private equity investments
- Represent the CalPERS Board of Administration and the Investment Office in the external investment community
- Monitor and evaluate performance, establishing work flow and setting priorities; and ensuring that private equity investments earn the highest net rate of return at prudent levels of risk, effectively managing cost and terms
- Consider and seek new and innovative alternative investment strategies and programs, analyze and make recommendations for incorporation into the CalPERS investment management portfolios

Desirable Qualifications:

In addition to evaluating each candidate's relative ability, as demonstrated by quality and breadth of experience, the following factors will provide the basis for competitively evaluating each candidate:

- The ideal candidate will have 15-20 years relevant investment experience; worked for a major financial institution or firm, governmental agency, and/or large pension fund; familiar with large varied investment portfolios
- An advanced degree in finance, economics or closely related field, certifications such as CFA, CPA or CAIA



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CalPERS

Private Equity, Managing
Investment Director

Sacramento, CA

Desirable Qualifications (cont'd):

- A broad, deep knowledge of the private equity asset class
- Be a strategic thinker with the ability to operate from a long-range and broad perspective
- Positive leadership that supports the ideas and implementation of new strategies
- Lead the Private Equity team in collaboration across all asset classes

Benefits:

CalPERS employees are eligible for a number of benefits. Health benefits and leave programs are available for most permanent, full-time employees and some permanent, part-time employees. Benefit eligibility may depend on length of service and may be subject to collective bargaining agreements, which are contracts negotiated between the State of California and employee organizations that define employees' wages, hours, and conditions of employment. Some added benefits CalPERS offers include:

- Alternate Work Schedules
- Flexible Work Hours
- Child Care

How to Apply: Please visit us at <https://jobs.ca.gov/CalHrPublic/Jobs/JobPosting.aspx?JobControlId=125557>

The State of California is an equal opportunity employer to all, regardless of age, ancestry, color, disability (mental and physical), exercising the right to family care and medical leave, gender, gender expression, gender identity, genetic information, marital status, medical condition, military or veteran status, national origin, political affiliation, race, religious creed, sex (includes pregnancy, childbirth, breastfeeding and related medical conditions), and sexual orientation.

It is an objective of the State of California to achieve a drug-free work place. Any applicant for state employment will be expected to behave in accordance with this objective because the use of illegal drugs is inconsistent with the law of the State, the rules governing Civil Service, and the special trust placed in public servants.



January 2019 Job Bulletin

Causeway Capital Management LLC

Research Analyst, Global Equities

Los Angeles, CA

Company Overview:

Causeway Capital Management LLC provides equity investment management services to corporations, pension plans, public retirement plans, sovereign wealth funds, Taft-Hartley pension plans, endowments and foundations, mutual funds, charities, private trusts, wrap fee programs and other institutions. The 100% employee-owned firm, based in Los Angeles, began operations in June 2001 and manages approximately \$60 billion in international, global and emerging market equities, both long only and long-short. Causeway employs a unique blend of fundamental and quantitative investment strategies, and offers its clients access to the firm's proprietary risk analytics.

Position Overview:

The Research Analyst will assist Sr. Research Analysts and Portfolio Managers in determining fair value for various listed companies globally, as well as conduct in-depth research in various industries. This will include constructing and maintaining financial models, as well as examining financial, economic and industry trends in the U.S. and overseas. The Research Analyst will be assigned at least one Causeway senior investment professional as a mentor to enhance learning about stocks and markets. The tenure of the role will be 2 – 4 years.

Skills and Abilities:

- A minimum of two years' post-undergrad experience at an investment bank, sell-side or buy-side firm
- Undergraduate university degree with excellent academic credentials
- A strong passion for equity investing and a respect for disciplined, value-oriented investment strategies
- Comprehensive understanding of financial statements and valuation methodologies
- Solid analytical, accounting and computer skills
- Excellent writing and oral communication skills; ability to articulate findings thoroughly, yet concisely
- Creativity and intellectual curiosity
- Demonstrated teamwork balanced with the ability to direct independent work
- Chinese language skills are a plus

How to apply: Please visit us at www.causewaycap.com/contact-us

Qualified applicants will receive consideration for employment without regard to the fact or perception of their race, religious creed, color, national origin, ancestry, physical disability, mental disability, medical condition, genetic information, marital status, sex, gender, gender identity, gender expression, age, sexual orientation, military and veteran status, or any other basis protected by applicable federal, state or local law.



January 2019 Job Bulletin

Causeway Capital Management LLC

Fundamental Research Intern,
Global Equities

Los Angeles, CA
(Summer 2019)

Company Overview:

Causeway Capital Management LLC provides equity investment management services to corporations, pension plans, public retirement plans, sovereign wealth funds, Taft-Hartley pension plans, endowments and foundations, mutual funds, charities, private trusts, wrap fee programs and other institutions. The 100% employee-owned firm, based in Los Angeles, manages approximately \$60 billion in international, global and emerging market equities, both long only and long-short. Causeway employs a unique blend of fundamental and quantitative investment strategies, and offers its clients access to the firm's proprietary risk analytics.

Position Overview:

The Research Intern will assist the research department in conducting in-depth fundamental research in various industries. This will include constructing and maintaining financial models, examining financial, economic and industry trends and conducting analyses on companies or securities. Research results and recommendations will be presented to the team. The Research Intern will further support portfolio manager's investment recommendations with in-house research, accounting validation and financial analysis.

Skills and Abilities:

- Minimum of 2 years of experience in investment banking, management consulting, public accounting or other related financial fields
- BA/BS with excellent academic credentials. Expected MBA graduation date in 2020
- A strong passion for value-oriented equity investing
- Comprehensive understanding of financial statements and valuation methodologies
- Solid analytical, accounting and computer skills, including Excel modeling
- Excellent writing and oral communication skills
- Creativity and intellectual curiosity
- Demonstrated teamwork
- Highest level of ethics
- Foreign language skills preferred

How to apply: Please visit us at www.causewaycap.com/contact-us

Qualified applicants will receive consideration for employment without regard to the fact or perception of their race, religious creed, color, national origin, ancestry, physical disability, mental disability, medical condition, genetic information, marital status, sex, gender, gender identity, gender expression, age, sexual orientation, military and veteran status, or any other basis protected by applicable federal, state or local law.



January 2019 Job Bulletin

DoubleLine

Fund Accountant

Los Angeles, CA

Position Overview:

The Fund Accountant will work on funds that invest in a portfolio of real estate related debt, commercial and residential mortgage loans and mortgage-backed securities, other securitized assets (including risk retention securities), index instruments, financing and hedging instruments and derivatives, and other debt and loan instruments. The Fund Accountant will coordinate and perform all accounting and finance functions for the fund.

Job Functions:

- Review and validate general ledgers maintained by external fund administrator for all fund entities
- Review daily, monthly, quarterly, annual accounting and reporting deliverables for all fund entities
- Monitor cash positions in all fund entities and project funding needs, prepare and submit payment and borrowing requests upon approval
- Monitor lender covenants. Prepare and submit lender reporting packages
- Review partnership allocations and investor statements, capital call calculations, distribution waterfall calculations to partners in accordance with terms of partnership agreements
- Review management fee calculations for investment partnerships; ensure accuracy of fee sharing calculations in accordance with terms of fee schedules
- Validate fund and investor performance calculations, including time-weighted return and IRR
- Coordinate and prepare fund financial statements and financial highlights for quarterly and annual reports; ensure all related footnotes and disclosure are in compliance with US GAAP. Coordinate and review conversion to local GAAP for foreign entity if needed
- Oversee statutory audits, coordinate with external and internal parties, and monitor audit progress

Qualifications:

- Bachelors' degree in Accounting or CPA license required
- Minimum of 5 years working experience in private equity partnership accounting
- Big-4 public accounting experience a plus
- Strong knowledge of accounting, generally accepted accounting principles and financial reporting is required
- Attention to detail and timelines required
- Proficiency in month/quarter/annual closings in US GAAP
- Understanding of real estate debt or private equity fund structures is required
- Experience with outside administrators and custodians preferred
- Knowledge of fixed income securities, debt instruments, alternative investments, securitization, or other investment products a plus
- Strong attention to detail, and a sense of urgency in gathering, synthesizing and communicating information



January 2019 Job Bulletin

DoubleLine

Fund Accountant

Los Angeles, CA

How to Apply:

Please visit <https://doubleline.com/openings/>. DoubleLine Group LP is an Equal Opportunity Employer.



January 2019 Job Bulletin

DoubleLine

CLO Portfolio Manager

Los Angeles, CA

Position Overview:

As a member of the Global Developed Credit team, the CLO Portfolio Manager will be responsible for the management of the Collateralized Loan Obligation (“CLO”) product line.

Job Functions:

- Participate in the daily management of existing CLO portfolios
 - Attend credit review discussions
 - Monitor credit and industry exposures
 - Develop CLO optimization trades
 - Understand details of each CLO indenture and impact on portfolio
 - Monitor status of coverage and quality tests through deal lifecycle
- Contribute to setup of warehouse facilities and ramp up of new issue portfolios
- Assist in the structuring, marketing and closing of new issue CLO transactions
- Develop indicative new CLO model portfolios
- Contribute to ongoing client communication and prospecting

Qualifications:

- Bachelor's Degree required
- MBA and/or CFA designation preferred
- Experience managing CLO portfolios through a credit cycle
- Strong credit background
- Excellent interpersonal skills and team orientation

How to Apply:

Please visit <https://doubleline.com/openings/>. DoubleLine Group LP is an Equal Opportunity Employer.



January 2019 Job Bulletin

DoubleLine

Quantitative Financial Analyst

Los Angeles, CA

Position Overview

The Quantitative Analyst will participate in a fast-paced, multi-task environment in collaboration with analysts, traders and portfolio managers. He/she will be a significant contributor of internal risk system development, support the investment teams by implementing advanced analytical techniques to scrutinize large data sets and analyze portfolios and securities across a variety of asset classes. The Quantitative Analyst will present analysis to the investment team in a clear and concise manner. The ideal candidate should have a strong passion for quantitative research and insight generation.

Job Functions:

- Develop and maintain analytical solutions to scrutinize large data sets
- Manage and improve the fund's infrastructure, including tools for portfolio and risk management, counterparty exposures and market analysis
- Conduct surveillance of investment positions and track evolving risk factors
- Support portfolio managers by carrying out top-down and bottom-up research across multiple investment markets

Qualifications:

- Advanced degree in a quantitative discipline
- 1-4 years of direct experience in financial modeling with significant exposures in fixed income
- Excellent analytical skills and empirical research experience
- Strong programming skills in R, MatLab or VBA; knowledge about C++/C# or Python a plus
- Experience working with large datasets/databases
- Solid understanding of risk management, [sensitivities (greeks), VaR, and stress-testing/scenario analysis]
- Strong research skills, including ability to be creative in finding answers
- Ability to prioritize time and tasks effectively and meet deadlines
- Ability to present analysis clearly and effectively
- Good command of written and spoken English
- Outstanding initiative and a strong work ethic
- Excellent interpersonal, written and verbal communication skills
- Team-oriented and must possess strong integrity and professionalism

How to Apply:

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January 2019 Job Bulletin

DoubleLine

Quantitative Financial Analyst

Los Angeles, CA

How to Apply (cont'd):

The above statements are intended to describe the general nature and level of work being performed. They are not to be construed as an exhaustive list of all responsibilities, duties and skills required. All employees may be required to perform duties outside of their normal responsibilities from time to time, as needed, to meet the ongoing needs of the organization.



January 2019 Job Bulletin

DoubleLine

Sr. Database Developer

Los Angeles, CA

Position Overview

The Database Developer will be responsible for adding new data sources to DoubleLine's databases, supporting existing databases, and providing data to end users and systems as needed. The developer must be comfortable with ETL development and must have experience using SQL Server and SSIS. The developer will be involved with extending DoubleLine's data delivery platforms, so experience with SSRS and BI/self service data tool is preferred.

Job Functions:

- Responsible for ETL development and support
- Responsible for production data support
- Responsible for assisting with ad-hoc data requests that are needed to support the business
- Interface directly with end users on occasion for data requests or to participate in requirements gathering
- Assist in documentation of systems and processes

Qualifications

- BS in Computer Science, MIS, or related field
- Minimum 3 years experience working with SQL Server and SSIS
- Experience working in application development
- Experience documenting and defining processes
- Experience with SSRS preferred
- Experience with .net preferred
- Proficient in Excel, Access, and VBA preferred
- Experience working in finance preferred
- Outstanding initiative, work ethic and attention to detail
- Excellent interpersonal, written and verbal communication skills
- Able to work independently with appropriate guidance in a deadline-driven environment
- Team-oriented and must possess strong integrity and professionalism
- Strong analytical and quantitative skills and the ability to identify problems and offer solutions

How to Apply:

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January 2019 Job Bulletin

DoubleLine

Sr. Developer

Los Angeles, CA

Position Overview

The Senior Developer will join the application development team that is responsible for developing and supporting DoubleLine's flagship proprietary application, which is used for assisting with investment and portfolio management decisions.

Job Functions

- Assist in the design, development, and support of a portfolio management system
- Provide support for ad hoc requests from DoubleLine's operations group
- Participate in system design and architecture discussions
- Interface directly with end users to determine system requirements
- Assist in documentation of systems and processes

Qualifications

- BS in Computer Science, MIS, or related software engineering field
- Working experience developing systems for capital markets and asset management
- Minimum 5 years experience using Microsoft .NET
- Minimum 3 years experience using Microsoft SQL Server
- Minimum 8 years experience developing software
- Experience developing in C#, MVC, HTML5, and JS
- Proficient in Excel, Access, and VBA preferred
- Outstanding initiative, work ethic and attention to detail
- Excellent interpersonal, written and verbal communication skills
- Able to work independently with appropriate guidance in a deadline-driven environment
- Team-oriented and must possess strong integrity and professionalism

How to Apply:

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January 2019 Job Bulletin

GlobeFlex Capital

Quantitative Investment Analyst

San Diego, CA

Company Overview:

GlobeFlex Capital, an employee-owned global equity manager, located in San Diego, California, is looking for an investment analyst with basic quantitative experience. The successful candidate will join our investment team, which is currently managing over \$4B in assets for institutional clients across the global equity market. The position requires 2-4 years of relevant finance experience, with knowledge of equity markets (international a plus), fundamental factor research, and familiarity of risk models and optimizers. Client servicing and communication skills are also a plus. In addition, candidates should be able to work well in a team, be highly self-motivated with the ability to execute independently.

Responsibilities include:

- Develop new ideas and participate in fundamental factor, construction and other related research projects
- Participate in enhancing and developing overall portfolio strategy
- Coordinate information and data for the investment team decision making
- Potential for client and consultant interaction

Candidate Qualifications:

- Strong work ethic, highly organized, ability to multi-task, detail-oriented, and motivated to excel
- Team focus
- 2-4 years of relevant finance experience
- An understanding of company financial statements and the role fundamentals play in the success of individual companies
- Basic familiarity with quantitative techniques, risk models and optimizers
- CFA designation candidates and/or MBA with FactSet experience is desired

How to Apply: Please send resumes to James Peterson, jpeterson@globeflex.com



January 2019 Job Bulletin

Hotchkis and Wiley

Compliance Manager

Los Angeles, CA

Position Description:

Hotchkis & Wiley (H&W) is seeking a Compliance Manager to join their 4 person Compliance Department. This position will oversee two Senior Compliance Associates and report directly to the Chief Compliance Officer.

Responsibilities:

The responsibilities of the Compliance Department include: reviewing and implementing policies, procedures and practices to ensure compliance with clients' portfolio restrictions and relevant laws/regulations; staying abreast of changes to federal and state investment advisory and securities laws and regulations; working with other departments to ensure adherence to laws and regulations. As part of the compliance program, the Compliance Department also performs periodic testing to determine the operating effectiveness of the firm's policies and procedures. Therefore, this position requires strong investment management industry knowledge and accounting/auditing skills. In addition, the individual should have significant experience in overseeing a trade compliance and employee trading monitoring systems.

Specific duties include but are not limited to:

- Manage the firm's daily compliance responsibilities, which include (1) trade reviews to determine compliance with client account guidelines and regulatory requirements using Charles River Investment Management and Bloomberg Trading Systems; (2) monitoring of employee trades using SchwabCT; and 3) reviewing other trade/portfolio investing activities. The Manager will also be expected to perform certain daily compliance monitoring responsibilities as well as serve as a back-up to the Senior Compliance Associates
- Complete and/or review monthly investment guideline checklists to ensure compliance with client investment guidelines and regulatory requirements
- Perform annual compliance reviews of the firm's policies and procedures, including trade allocations, best execution reviews, etc.
- Complete periodic compliance reporting and draft "client ready" responses to due diligence questionnaires
- Review marketing and advertising materials for adherence to SEC regulations and guidance
- Identify and resolve independently the interpretation of investment guidelines or laws/regulations
- Develop procedures and controls to enhance the firm's existing control environment, including use of technology to monitor investment activities and regulatory requirements
- Interpret and communicate internal policies and procedures and regulatory requirements to portfolio management, trading, operations, marketing/client service and other departments, as necessary
- Problem-solve, research, and analyze information on compliance matters impacting the firm's business activities



January 2019 Job Bulletin

Hotchkis and Wiley

Compliance Manager

Los Angeles, CA

Requirements:

- Bachelor's degree (accounting major or background in auditing/accounting would be favorably looked upon)
- 10 years minimum experience in investment management compliance, including 2-3 years of supervisory experience.
- Significant working experience in Charles River Investment Management and/or Bloomberg trading systems is required
- Outstanding initiative, self-starter, strong work ethic and integrity
- Attention to detail with strong problem solving, analytical and organizational skills
- Proven ability to successfully work both independently and in a team, and interact effectively at all levels
- Excellent written and verbal communication skills are essential
- Strong proficiency in software applications, especially Microsoft Excel

How to Apply:

Interested candidates should send their resume to: human.resouces@hwcm.com

Hotchkis & Wiley is an Equal Opportunity employer (EEO), and all employees and applicants will be entitled to equal employment opportunities when employment decisions are made. Hotchkis & Wiley will take affirmative action to recruit, hire, train and promote individuals in all job classifications without regard to race, religion, color, age, sex, national origin, citizenship, pregnancy, veteran status, sexual orientation, physical or mental disability, gender identity, or membership in a historically under-represented group.



January 2019 Job Bulletin

Meketa Investment Group

Research Analyst, Fixed Income

Carlsbad, CA

Position Summary:

The Research Analyst is a member of the Public Markets Manager Research Team, the group within Meketa that performs due diligence on equity, fixed income, and hedge fund managers. The primary responsibility of the analyst is to research and analyze fixed income investment managers. The individual will work with the firm's consultants and other investment professionals and provide investment recommendations to the firm's clients. The position is based in our Carlsbad, CA office.

Essential Responsibilities:

- Meet with and evaluate the capabilities of fixed income managers
- Identify promising new managers in the relevant asset class
- Draft comprehensive manager meeting notes and prepare manager analyses
- Present manager analyses at team meetings and critique the analyses of others
- Prepare presentation documents and assist with recommendations to clients
- Monitor the performance of managers with existing client investments
- Write client memos on managers as required
- Present manager search documents to clients as required
- Prepare research and updates on the relevant asset class

Desired Experience:

The Research Analyst is expected to have general investment knowledge and familiarity with the investment consulting and investment management industries. Candidates should possess 3 to 5 years of relevant investment experience. The candidate should have a strong understanding of equity and fixed income markets and be highly motivated. An individual who is a committed team player, has strong communication skills, is well organized and is willing to learn, and is detail-oriented, are other desirable attributes.

Required Skills, Experience, Knowledge:

- Minimum of 3 years of relevant work experience in the investment industry
- Bachelor's degree required
- MBA and CFA charterholder or candidate preferred
- Strong analytical and quantitative skills
- Superior writing, presentation, communication, and interpersonal skills
- Solid computer skills including facility with Microsoft Word and Microsoft Excel

How to Apply: Please send resume with cover letter for the position and location for which you are applying via e-mail to: RecruitingRE@meketagroup.com



January 2019 Job Bulletin

Meketa Investment Group

Research Analyst, Fixed Income

Carlsbad, CA

How to Apply (cont'd):

Meketa Investment Group, Inc. is an Affirmative Action/Equal Opportunity Employer. Applicants are considered for all positions without regard to race, color, religion, sex, sexual orientation, national origin, citizenship, age, marital or veteran status, or the presence of a non-job-related disability.



January 2019 Job Bulletin

Meketa Investment Group

Performance Analyst

Westwood, MA

Position Summary:

The Performance Analyst must be capable of working with MIG's more complex client relationships. The Performance Analyst will also work with other MIG departments to ensure proper work flow, recommend and initiate work flow improvements, and increase inter-department communication.

Job Requirements:

- Bachelor's Degree in Finance, Economics, or related field
- Progress towards CFA designation preferred
- Ability to gather, organize, and coordinate data from disparate sources
- Excellent quantitative skills with strong knowledge of investment statistics
- Facility with spreadsheet programs and word processing software
- Demonstrated skill at analyzing, evaluating, and reviewing quantitative information, with a high degree of accuracy
- Excellent attention to detail and organized work habits
- Ability to work efficiently and accurately under time pressure
- Ability to work well with others both internally and externally
- Familiarity with financial and statistical concepts
- Ability to work independently using prudent judgement and to pro-actively seek out new projects

Responsibilities:

- Independently gather, organize, and verify financial data related to client accounts and investment managers and strategies
- Apply knowledge of economic indicators, investment markets, attribution and benchmarks to analysis of investment results
- Maintain and update regularly databases of investment information
- Calculate and verify client-related investment data and statistics
- Produce client-ready data for quarterly and monthly reviews, including reviewing data for accuracy and reasonableness
- Investigate and resolve performance discrepancies; reconcile and validate results, ensuring that asset transfers and prices are appropriately reflected
- Collaborate on the development of internal indices and analytical tools
- Work with Investment Analysts and Consultants with special projects as needed
- Fulfill any and all other duties deemed necessary by management



January 2019 Job Bulletin

Meketa Investment Group

Performance Analyst

Westwood, MA

Measures of success:

- Accuracy and timeliness of client-related work product
- Level of proficiency with internal proprietary software, as well as external data providers such as Bloomberg, Thomson Reuters, and Morningstar Direct
- Level of effectiveness in interacting with external data suppliers (custody banks, investment managers)
- Contribution to improvements in the efficiency of the company's data oriented processes and procedures
- Maintenance of good working relationships with other employees
- Levels of satisfaction of Investment Analysts and Consultants as users of the Performance Analyst's services

How to Apply: The position is located in our Carlsbad, CA office. Please send resume with cover letter via e-mail to: RecruitingSD@meketagroup.com

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January 2019 Job Bulletin

Oaktree Capital

**Analyst, Portfolio Analytics,
Risk and Reporting**

Los Angeles, CA

Company Overview:

Oaktree is a leader among global investment managers specializing in alternative investments, with \$124 billion in assets under management as of September 30, 2018. The firm emphasizes an opportunistic, value-oriented and risk-controlled approach to investments in credit, private equity, real assets and listed equities. The firm has over 900 employees and offices in 18 cities worldwide. For additional information please visit our website at www.oaktreecapital.com.

Scope and Responsibilities:

As Oaktree's Portfolio Analysis and Reporting team continues to expand its suite of client and portfolio management reports, we are seeking an individual to help produce reports as well as engineer and implement operational production routines to ensure that high quality reports are delivered accurately, consistently and on time.

Responsibilities:

- Successfully deliver analyses and reports to clients, prospects, consultants and investment teams by understanding Oaktree's complex, systematic investment process, markets invested in, financial instruments used and reporting processes
- Evolve our reporting suite in response to, and in anticipation of, client and industry demands
- Coordinate, to the extent needed, the production of reporting content needed from other Oaktree departments, including Legal, Compliance, Accounting, and Marketing
- Master system technology to learn to create data extracts for reporting purposes. Review financial data for various Oaktree portfolios and develop charts and tables for presentations and publications;
- Serve as a subject matter expert and resource to Product Specialists, Marketing Representatives, Portfolio Managers and Client Services
- Conduct, as necessary, competitor analysis, performance contribution/attribution analysis, and other reports at the request of members of Marketing, Client Relations and the Investment Teams

Experience Required:

- 1-2 years of experience at an Asset Management company, Investment Bank or other related financial services company
- Familiarity with credit instruments (high yield bonds, senior loans and convertible securities) is preferred
- Knowledge of relevant reporting outputs and metrics including portfolio accounting, performance reporting, risk metrics and portfolio characteristics.
- Familiarity with different reporting perspectives: Region/Country breakdown, industry breakdown, maturity distributions, credit quality ratings



January 2019 Job Bulletin

Oaktree Capital

Analyst, Portfolio Analytics,
Risk and Reporting

Los Angeles, CA

Experience Required (cont'd):

- Comfortable and capable of working with portfolio managers, prospects and clients to understand and define reporting requirements
- Experience analyzing financial data and metrics with sufficient familiarity to recognize potential issues
- Experience managing and manipulating large amounts of data in Microsoft Excel

Personal Attributes:

- Outstanding initiative and a strong work ethic
- Ability to operate independently on short and long term goals
- Excellent interpersonal skills with the ability to leverage firm wide resources in an effective and judicious manner
- Detail-oriented and a natural problem solver; have the resolve to independently research problems and offer solutions
- Organized and able to manage multiple projects with differing priorities to meet deadlines
- Team-oriented and must possess strong integrity and professionalism and share Oaktree's common goal of excellence
- Passion for improving systems and processes

Education:

Bachelor's degree required

How to Apply: Visit the website for more information <https://careers-oaktreecapital.icims.com/jobs/1647/analyst%2c-portfolio-analytics%2c-risk-and-reporting/job>

Oaktree Capital Management, L.P. is an equal opportunity employer.



January 2019 Job Bulletin

Oaktree Capital

Associate, Corporate Finance

Los Angeles, CA

Company Overview:

Oaktree is a leader among global investment managers specializing in alternative investments, with \$124 billion in assets under management as of September 30, 2018. The firm emphasizes an opportunistic, value-oriented and risk-controlled approach to investments in credit, private equity, real assets and listed equities. The firm has over 900 employees and offices in 18 cities worldwide. For additional information please visit our website at www.oaktreecapital.com.

Scope and Responsibilities:

Oaktree is seeking an individual to be an Associate on the Corporate Finance team. Responsibilities of the Corporate Finance team include (i) analyze and communicate historical and projected financial performance to internal and external stakeholders, (ii) manage the annual budgeting process, (iii) evaluate the financial impact of business development, (iv) execute capital markets transactions and (v) various other initiatives to support Senior Management. Responsibilities will include:

- Prepare materials to be presented to Senior Management and the Board of Directors
- Develop corporate, department and project earnings and cash flow forecasts
- Analyze the profitability of Oaktree's business including expense allocations, margin metrics and growth opportunities
- Analyze drivers of historical financial performance, including key trends that are impacting the business
- Prepare annual budgets, and understanding key trends in business unit resource utilization
- Evaluate potential new business development and the associated financial ramifications
- Support corporate financing activities, including preparation of materials for lenders and rating agencies
- Assist in the preparation of public filings and other internal and external communication documents, including financial analyses for the quarterly earnings release and call
- Measure our performance and valuation relative to peers and other relevant benchmarks

Experience Required:

- 2-5 years of corporate finance, FP&A, accounting, investment banking or consulting experience
- Outstanding analytical skills
- Building and working with complex financial models
- Basic understanding of public company financial statements and accounting
- Knowledge of Microsoft Excel
- Familiarity with SAP BPC or other financial planning and analysis software a plus

Personal Attributes:

- Self-starter with a proven ability to take initiative
- Responsible with a strong work ethic and sense of dedication



January 2019 Job Bulletin

Oaktree Capital

Associate, Corporate Finance

Los Angeles, CA

Personal Attributes (cont'd):

- Excellent interpersonal, verbal and written communication skills
- Works well under pressure and with time constraints
- Outstanding organization skills with high attention-to-detail
- Team-oriented with strong integrity and professionalism
- Must be able to handle highly confidential information and situations with professionalism and tact

Education:

Bachelor's degree from a top college or university

How to Apply: Visit the website for more information <https://careers-oaktreecapital.icims.com/jobs/1678/associate%2c-corporate-finance/job>

Oaktree Capital Management, L.P. is an equal opportunity employer.



January 2019 Job Bulletin

Verus

Consulting Associate

El Segundo, CA

Company Overview:

Verus is an independent, institutional investment consulting firm. Since 1986, we have been working closely with our clients and other professionals to add value to their investment portfolios by providing research driven investment solutions that address their specific needs. Through independent, conflict-free advice and investment expertise, our professionals strive to be the driving force that empowers clients to achieve their investment objectives. We are looking for a talented professional who embodies our firm values of diligence, professionalism, expertise, client service, and collaboration.

We offer a competitive benefits package including medical, dental, life, disability, and vision insurance; 401(k) program with a company match; profit sharing; section 125 cafeteria plan; CFA and other professional certifications sponsorship; 11 paid holidays; and 15 days of paid time off the first year of employment.

In addition, our boutique firm allows us to have an exceptionally convivial corporate culture with opportunities for career development and cross-departmental collaboration. On top of strengthening growth and partnerships in the work environment, Verus promotes happy and healthy living with a variety of employee appreciation initiatives, a good sense of humor, and several company events throughout the year.

Job Purpose:

Verus is in search of an experienced, self-motivated individual to service our institutional client consulting function in our El Segundo, CA office. Candidates should be process-minded, detail oriented, capable, flexible, and focused on their results.

The Consulting Associate acts as the primary resource for Consultant support. Responsibilities include: meeting preparation, investment policy development, asset allocation studies, investment manager coordination, responding to client requests and assisting consultant in new business development.

Prerequisites:

- Bachelor's Degree in Business required; preferably Finance
- MBA, Masters of Finance, and/or CFA Level II candidacy preferred
- Two or more years of analytical and research experience in a related field
- Solid knowledge of financial investing techniques; knowledge and familiarity with the major markets
- Basic understanding of pensions, defined contribution plans and non-profits

How to Apply:

For consideration, e-mail resume and salary requirements to jobs@verusinvestments. No phone calls, please.

Verus is an Equal Opportunity Employer.



January 2019 Job Bulletin

Voya

Credit Analyst, Investment Grade

Atlanta, GA

Company Overview:

Voya Investment Management (Voya IM) is a leading active asset management firm. As of March 31, 2018, Voya IM manages approximately \$227 billion* for affiliated and external institutions as well as individual investors. Drawing on over 40 years of experience and an ongoing commitment to reliable investing, Voya IM has the resources and expertise to help long-term investors achieve strong investment results.

Job Purpose:

This is an opportunity to join an active agency mortgage-backed securities (MBS) investment team with over \$10 billion in AUM. The team has a consistent track record of strong performance investing in mortgage-backed securities issued by FNMA, FHLMC and GNMA for clients including: insurance companies, pension accounts, retirement accounts and retail investors.

Key Responsibilities:

In the analyst role, you will work extensively with the portfolio managers in creating and maintaining daily analytics, summarizing research reports, providing trade support, as well as developing multi-factor relative value graphs, charts and reports. You should be analytically and technically proficient, have a strong level of communication and self-motivation.

Qualifications:

- Bachelor's degree in finance, quantitative analysis, mathematics, statistics, accounting or a related field
- Progress toward CFA Charter, MBA or Master's in Quantitative Finance discipline desired
- 1 – 4 years buy-side Fixed Income experience, preferably in the capacity of Investment Management
- Programming/coding experience with MATLAB with an emphasis on statistics and machine learning
- Direct experience working with mortgage-backed securities preferred
- Excellent analytical and quantitative skills
- Ability and willingness to quickly learn the investment strategy and related issues of the business, many of which are highly complex and quantitative
- Strong leadership and organizational skills
- Ability to work in a complex organization effectively
- Demonstrated problem solving and decision-making skills
- Good verbal and written communication skills
- Self-motivated, focused and highly driven to meet goals and deadlines
- Strong teamwork skills

Critical Skills:

At Voya, we have identified the following critical skills which are key to success in our culture:



January 2019 Job Bulletin

Voya

Credit Analyst, Investment Grade

Atlanta, GA

Critical Skills (cont'd):

- **Customer Focused:** Passionate drive to delight our customers and offer unique solutions that deliver on their expectations.
- **Critical Thinking:** Thoughtful process of analyzing data and problem solving data to reach a well-reasoned solution.
- **Team Mentality:** Partnering effectively to drive our culture and execute on our common goals.
- **Business Acumen:** Appreciation and understanding of the financial services industry in order to make sound business decisions.
- **Learning Agility:** Openness to new ways of thinking and acquiring new skills to retain a competitive advantage.

How to Apply: Please visit https://godirect.wd5.myworkdayjobs.com/voya_jobs/job/GA-Atlanta-Powers-Ferry-Rd/Credit-Analyst---Investment-Grade_JR0019853



January 2019 Job Bulletin

Voya

Director of Quantitative Equity Research

New York, NY

Company Overview:

Voya Investment Management (Voya IM) is a leading active asset management firm. As of March 31, 2018, Voya IM manages approximately \$227 billion* for affiliated and external institutions as well as individual investors. Drawing on over 40 years of experience and an ongoing commitment to reliable investing, Voya IM has the resources and expertise to help long-term investors achieve strong investment results.

This position has responsibility for setting the research agenda for quantitative equity, including thought leadership in quantitative research, investment ideas, and portfolio design for Voya Investment Management (Voya IM). With a strong background in technical computing and statistics, you will be responsible for accelerating the development and design of new quantitative research and strategies. This will include empirical research into U.S. and global equity market inefficiencies. Must be familiar with fundamental, expectational and market data, have a solid knowledge of asset pricing literature, and strong programming skills. The individual will represent the views of the team across the firm and to the industry at large.

Responsibilities:

- As the senior member of our quantitative research team, you will oversee the design and development of equity investment models by identifying novel investment ideas and new data sources from academia, professional publications, fundamental equity analysts, and peer review
- Represent Quantitative Equity and Voya IM externally (conferences, client meetings, etc.) as an industry authority on customized quantitative solutions to drive business growth in the institutional space
- Create thought leadership content: white papers, investment commentary, product positioning, publication in industry journals, etc.
- Work with quant leadership and product team to develop and implement innovative strategies, products and solutions
- Analyze quantitative portfolios to create actionable recommendations to capture quantitative insights, refine the portfolio construction process, and attribute portfolio return

Ideal Candidate:

- 10+ years of experience in quantitative equity research
- Excellent quantitative skills, with an accomplished background in economics, finance, engineering, computer science, or another quantitative discipline. PhD or other advanced degree a plus
- Knowledge of advanced statistical and modeling techniques (i.e. LASSO, Random Forest), unsupervised learning, etc. Experience with alternative data a plus
- Strong programming skills, with experience using a structured programming language and/or statistics package
- A thought leader with excellent communication skills, including the ability to effectively articulate complex financial and mathematical concepts to a variety of audiences



January 2019 Job Bulletin

Voya

Director of Quantitative Equity Research

New York, NY

Ideal Candidate (cont'd):

- Expert-level knowledge of market trends and challenges facing institutional clients
- Independent thinker with good economic intuition and demonstrated record of original research
- Inventive problem solver who can conceptualize solutions and drive execution within Voya Investment Management
- Teamwork-oriented collaborator and leader who can build consensus around complex and fluid issues

Critical Skills:

At Voya, we have identified the following critical skills which are key to success in our culture:

- Customer Focused: Passionate drive to delight our customers and offer unique solutions that deliver on their expectations
- Critical Thinking: Thoughtful process of analyzing data and problem solving data to reach a well-reasoned solution
- Team Mentality: Partnering effectively to drive our culture and execute on our common goals
- Business Acumen: Appreciation and understanding of the financial services industry in order to make sound business decisions
- Learning Agility: Openness to new ways of thinking and acquiring new skills to retain a competitive advantage

How to Apply: Please visit https://godirect.wd5.myworkdayjobs.com/voya_jobs/job/NY-New-York-230-Park-Ave/Director-of-Quantitative-Equity-Research_JR0019387



January 2019 Job Bulletin

Voya

Analyst/Associate,
Hedge Fund Investor Relations

New York, NY

Company Overview:

Voya Investment Management (Voya IM) is a leading active asset management firm. As of March 31, 2018, Voya IM manages approximately \$227 billion* for affiliated and external institutions as well as individual investors. Drawing on over 40 years of experience and an ongoing commitment to reliable investing, Voya IM has the resources and expertise to help long-term investors achieve strong investment results.

Position Description:

This position will focus on the Investor Relations function for the Structured Assets & Alternatives business at Voya Investment Management. The role involves the ongoing support for a \$2+ billion platform of fixed income hedge funds and other alternative product offerings. The individual will be part of a small, dedicated team responsible for overseeing the firm's growing alternatives business. Preference is for a candidate with knowledge of fixed income markets (especially credit, mortgages, or real estate debt), derivatives, and/or hedge fund/private debt fund experience. Experience working with institutional investors is also a plus. Candidate should be a self-starter with a strong attention to detail.

Key Responsibilities:

- Assist with responding to investor queries and support the sales team globally
- Prepare marketing materials and periodic updates
- Maintain industry databases and online portal
- Assist with monitoring all investor transactions; coordinating with accounting, operations, and fund administrator to reconcile investor activities and ensure proper set up of new investors
- Assist with the oversight of the transfer agent in client onboarding and investor statements
- Assist in the creation of technical marketing material and analysis
- Work on the development and launch of new alternative offerings

Qualifications:

- At least 2 years of meaningful work experience in the investment management industry - prior hedge fund or other relevant alternatives experience preferred
- Bachelor's degree at a minimum
- Strong analytical skills with a working knowledge of fixed income investments and derivatives
- A self-starter with strong organizational skills, a high attention to detail, and the ability to handle multiple projects and deadlines
- Excellent verbal and written communication skills
- Experience with client and/or performance reporting
- Proficient in Excel and PowerPoint
- Salesforce/CRM and BlackRock Aladdin experience a plus



January 2019 Job Bulletin

Voya

Analyst/Associate,
Hedge Fund Investor Relations

New York, NY

Qualifications (cont'd):

- Series 7 license a plus

Critical Skills:

At Voya, we have identified the following critical skills which are key to success in our culture:

- Customer Focused: Passionate drive to delight our customers and offer unique solutions that deliver on their expectations
- Critical Thinking: Thoughtful process of analyzing data and problem solving data to reach a well-reasoned solution
- Team Mentality: Partnering effectively to drive our culture and execute on our common goals
- Business Acumen: Appreciation and understanding of the financial services industry in order to make sound business decisions
- Learning Agility: Openness to new ways of thinking and acquiring new skills to retain a competitive advantage

How to Apply: Please visit https://godirect.wd5.myworkdayjobs.com/voya_jobs/job/NY-New-York-230-Park-Ave/Associate--Hedge-Fund-Investor-Relations_JR0018980



January 2019 Job Bulletin

Western Asset

ESG Research Analyst

Pasadena, CA

Overview:

The ESG Research Analyst will monitor ESG data and news for issuers, provide support for the firm's ESG research efforts, work with other internal teams to develop capabilities and processes, and assist in the development of Investment Management (IM) tools and marketing materials. The analyst will help to develop the firm's value proposition and contribute to the firm's thought leadership in ESG.

Responsibilities/Duties:

- Conduct surveillance of ESG issues
 - Monitor third-party vendor data, news and credit research
 - Provide appropriate reports on issuer and industry ESG issues
- Provide analysis and support for ESG client reports and research
 - Perform quantitative analysis for client ESG reports
 - Facilitate responses to ESG-related client requests and RFPs
 - Support Research Analysts by conducting industry and issuer ESG analysis
 - Facilitate and participate in ESG engagement with issuers
- Collaborate with other internal teams to develop Western Asset's ESG capabilities
 - Work with Technology, Legal and Client Services to develop ESG reporting and compliance functions
 - Participate in quality assurance and release testing
 - Work with Risk/Analytics on ESG performance attributions and portfolio risk/return assessment
- Work on product development and marketing initiatives
 - Create model ESG portfolios and related presentation content
 - Contribute to ESG thought leadership

Competencies:

- 3-5 years of relevant work experience, demonstrating the ability to perform analytical and research tasks
- Passion for aligning financial returns with environmental and societal impact
- Self-motivated with ability to work independently and to adapt to changing environment
- Ability to meet tight deadlines while exercising strong attention to detail
- Excellent analytical and problem solving ability, financial, mathematical and statistical skills
- Proficiency in Excel, Microsoft Access
- Solid knowledge of a major programming language, i.e. Visual Basic
- Strong communication skills, both written and verbal



January 2019 Job Bulletin

Western Asset

ESG Research Analyst

Pasadena, CA

Academic Qualifications (minimum requirements):

- Bachelor's degree in related discipline
- Chartered Financial Analyst (CFA) encouraged

How to Apply: Please apply directly at <http://www.westernasset.com/us/en/careers/jobs.cfm?group=pm>

EQUAL EMPLOYMENT OPPORTUNITY ("EEO") Western Asset Management is an Equal Opportunity/Affirmative Action Employer. All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, citizenship, age, marital status, medical condition (including pregnancy and related conditions), physical or mental disability, protected veteran status, and/or any other characteristic protected by law.



January 2019 Job Bulletin

Wilshire Associates Inc.

Analyst

Pittsburgh, PA

Job Description:

Wilshire Associates Incorporated is seeking an investment professional to join the Wilshire Private Markets (WPM) Group. WPM is a global private markets solutions provider, managing commingled discretionary fund of funds, customized separate accounts and providing investment consulting services across private asset classes. WPM currently manages approximately \$5 billion of institutional capital, including investments in private partnerships, direct co-investments and secondary limited partnership interests with a focus on buyouts, venture capital, distressed strategies and real assets.

This individual will be a member of the WPM investment team, working closely with senior management of the division.

Responsibilities:

- Contributing member of WPM investment team, with responsibilities throughout the investment process
- Helping maintain WPM's research database
- Acting as key member of deal teams, conducting due diligence and drafting investment memos for fund investments and transactions (e.g., co-investments and secondaries)

Required Experience and Skills:

- Bachelor's degree from top-tier school
- Excellent analytical skills (both quantitative and qualitative); internship at a nationally recognized investment banking, management consulting or financial services firm is preferred
- Outstanding written and oral communication skills
- High proficiency in Microsoft Office (particularly Excel)
- Ability to work independently and efficiently under time pressure in a fast-paced environment with a special attention to detail

Our Offer:

- An international, dynamic, entrepreneurial work environment
- Competitive compensation package, including a bonus opportunity
- 3 weeks of vacation, 8 paid holidays per year
- 401(k)/Roth 401(k)/Medical/Dental/Vision & Life insurance

How to apply: Please apply directly at www.wilshire.com. No phone calls please.



January 2019 Job Bulletin

Wilshire Associates Inc.

Analyst

Pittsburgh, PA

How to apply (cont'd):

Wilshire Associates Incorporated is an Equal Opportunity Employer, Minority/Female/Disability/Veteran. Wilshire Associates Incorporated is an SEC registered investment adviser and required to track certain political contributions under Rule 206(4)-5. As such, you may be required to disclose your prior political contributions.



January 2019 Job Bulletin

Wilshire Associates Inc.

Analyst/Senior Analyst

Santa Monica, CA

Job Description:

Wilshire Associates has four business units; Wilshire Consulting, Wilshire Analytics, Wilshire Funds Management and Wilshire Private Markets (“WPM”). Since its founding in 1972, Wilshire Associates has evolved from an investment technology firm into a global advisory company specializing in investment products, consulting services, and technology solutions. We have maintained throughout our history our strong commitment to our clients and have worked to retain our position of leadership in providing innovative ideas to the investment industry.

Wilshire Private Markets is a global private markets solutions provider, managing multi-investor discretionary funds, customized separate accounts and non-discretionary advisory services. WPM invests in private partnerships, direct co-investments and secondary limited partnership interests with a focus on buyouts, venture capital, private credit and private real assets, and currently manages and advises on approximately \$8.5 billion of institutional capital. We have offices in the United States, Europe, and Hong Kong.

The expected start date for this position is January 2019. This individual will be a member of the WPM investment team, working closely with senior management of the division.

Responsibilities:

- Contributing member of WPM investment team, with responsibilities throughout the investment process
- Helping maintain WPM’s research database
- Acting as key member of deal teams, conducting due diligence and drafting investment memos for fund investments and transactions (e.g., co-investments and secondaries)

Required Experience and Skills:

- Bachelor’s degree from top-tier school
- 0-3 years of experience, preferably in finance
- Excellent analytical skills (both quantitative and qualitative); internship at a nationally recognized investment banking, management consulting or financial services firm is preferred
- Outstanding written and oral communication skills
- High proficiency in Microsoft Office (particularly Excel)
- Ability to work independently and efficiently under time pressure in a fast-paced environment with a special attention to detail

Our Offer:

- An international, dynamic, entrepreneurial work environment
- Competitive compensation package, including a bonus opportunity



January 2019 Job Bulletin

Wilshire Associates Inc.

Analyst/Senior Analyst

Santa Monica, CA

Our Offer (cont'd):

- 3 weeks of vacation, 8 paid holidays per year
- 401(k)/Roth 401(k)/Medical/Dental/Vision & Life insurance

How to apply: Please apply directly at www.wilshire.com. No phone calls please.

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January 2019 Job Bulletin

Wilshire Associates Inc.

Junior to Mid-Level
Application Developer (DOE)

Santa Monica, CA

Job Description:

Wilshire Associates Incorporated is a global investment advisory firm that offers customized, institutionally based solutions to meet the investment needs of our clients. Wilshire Funds Management (WFM), a division of Wilshire Associates Incorporated is dedicated to provide customized investment solutions in the areas of asset allocation, manager research, portfolio construction, and risk management and is seeking to identify a Junior to Mid-Level Application and Database Developer to join its Operations Technology team. Successful candidate will be responsible for analysis, design, and developing complex systems and applications for its Portfolio Management Processes. The individual will be involved in all aspects of the project life cycle, which includes design, programming, testing, implementation, maintenance and documentation. She/he will provide support for business systems by developing, maintaining and enhancing existing Web and Client based applications, re-engineering programs to conform to system changes, and solving complex customer or third party data.

Key Responsibilities:

- Operate autonomously as well as part of a team based on the scope and the requirements of the programming projects
- Ensure all requirements are understood, documented and analyzed appropriately for maximum efficiency in the coding, test and deploy process
- Adhere to the Software Development Life Cycle, development methodology, ITIL, ISO program standards and IT controls for best coding practices, testing, systems acceptance, change control, and security
- Code, test, and debug complex application programs to create new business applications and interfaces or maintains/modifies existing business applications according to program specifications
- Develops work plans and technical documents covering system architecture, conversion, integration, testing, and implementation for a system or complex enhancement to a system
- Performs quality assurance functions
- Prepares, reviews, and validates technical documents and user manuals
- Perform a full range of database support
- Implement security practices on assigned systems
- Understand and interpret users and project stakeholder's ideas into specific technology solutions
- Works closely with end users to develop and enhance solutions
- Install and integrate new software programs into existing programming systems

Desired Skills and Background:

- Bachelor or advanced degree in Computer Science



January 2019 Job Bulletin

Wilshire Associates Inc.

Junior to Mid-Level
Application Developer (DOE)

Santa Monica, CA

Desired Skills and Background (cont'd):

- 2 - 5+ years programming experience with C#, .NET, .NET Core, ASP.Net, XML, Windows and Web Services, MSMQ and SQL service broker
- 2 - 5+ years programming experience with Transact SQL (MS SQL Server)
- 2 - 5+ years of UI development, including: HTML, CSS, Javascript, JQuery and AJAX
- Advanced experience with Visual Source Safe or other version control system
- Principles and practices of applications design, programming and software development life cycle
- Application programming interfaces, communication protocols, programming languages, and various scripting languages
- Experience with LINQ, ADO.NET and Entity Framework
- Strong debugging skills and excellent problem solving skills
- Operational Data Store modeling, design and development
- Solid knowledge of SQL objects
- Knowledge with Microsoft SSRS and SSIS
- Experience with GitHub
- Experience with Microsoft TFS is a plus
- Dockers and Kubernetes knowledge is a big plus
- Principles and practices of research methodology and data analysis

Our Offer:

- An international, dynamic, entrepreneurial work environment
- Competitive compensation package, including a bonus opportunity.
- 3 weeks of vacation, 8 paid holidays per year
- 401(k)/Roth 401(k)/Medical/Dental/Vision & Life insurance

How to apply: Please apply directly at www.wilshire.com. No phone calls please.

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January 2019 Job Bulletin

Wilshire Associates Inc.

Analyst, Alternative Investments

Santa Monica, CA

Job Description:

Wilshire Associates Incorporated is a global investment advisory firm that offers customized, institutionally based solutions to meet the investment needs of our clients. Wilshire seeks an Analyst to join its dedicated Manager Research Team. This team of professionals provides investment manager due diligence, rating, and recommendation support to Wilshire Funds Management (WFM) portfolio managers and clients, as well as to Wilshire's Consulting Division. The Analyst position is suited for people who have recently graduated from college and have some professional working experience. An Analyst will work closely with senior investment team members and will develop professional skills in a variety of areas. We are looking to identify self-motivated candidates with strong academic backgrounds and professional drive. WFM is dedicated to providing customized investment solutions in the areas of manager research, asset allocation portfolio construction, and risk management to institutional and intermediary clients. Wilshire's Consulting division, established in 1981, is well known and respected for providing investment consulting services to large pension funds, endowments, foundations and insurance companies.

Key Responsibilities:

- Support the team's senior manager research professionals in all aspects of manager due diligence
- Tasks include, but are not limited to, generating quantitative analysis, preparing reports and presentations, data collection and organization
- Opportunity to participate in hedge fund manager meetings once the analyst demonstrates mastery of core responsibilities
- Support other investment activities related to market analysis, performance analysis, investment research, and client servicing
- Attend all internal weekly investment research meetings as well as Investment Committee meetings

Required Skills and Background:

- BA/BS degree required
- Strong verbal and written communication skills and quantitative and analytical ability required
- Strong Microsoft Excel skills

Desired Skills and Background:

- Business and finance related majors preferred
- 1-2 years of relevant work experience preferred
- Progress towards or desire to participate in the CFA and CAIA programs is preferred
- Knowledge of investments and interest in capital markets and hedge fund/alternative investments is highly desired
- Strong Microsoft Office application skills desired
- Experience with Visual Basic for Applications preferred but not required



January 2019 Job Bulletin

Wilshire Associates Inc.

Analyst, Alternative Investments

Santa Monica, CA

Desired Skills and Background (cont'd):

- Attentive to detail and accuracy
- Team player and client centric

Our Offer:

- An international, dynamic, entrepreneurial work environment
- Competitive compensation package, including a bonus opportunity
- 3 weeks of vacation, 8 paid holidays per year
- 401(k)/Roth 401(k)/Medical/Dental/Vision insurance

How to apply: Please apply directly at www.wilshire.com. No phone calls please.

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January 2019 Job Bulletin

Wilshire Associates Inc.

Senior Institutional Fundraiser,
Senior Associate/Vice President (DOE)

Santa Monica, CA or
Pittsburgh, PA

Company Overview:

Wilshire Associates is a leading global independent investment consulting and services firm and provides consulting services, customized investment products, and analytics solutions to plan sponsors, investment managers and financial intermediaries. Headquartered in Santa Monica, CA, its four business units include Wilshire Funds Management, Wilshire Analytics, Wilshire Consulting and Wilshire Private Markets. Wilshire Funds Management provides customized multi-discipline, multi-manager and hedge fund investment solutions to financial intermediaries serving retail and institutional investors. Wilshire Analytics incorporates Wilshire's investment technology product offerings. Wilshire Consulting provides investment consulting services, including asset allocation, investment structure, manager search and performance measurement to some of the nation's largest public and corporate retirement plans, endowments, foundations, and major insurance companies. Wilshire Private Markets was founded in 1996 and for more than two decades has assisted pension funds, endowments, and foundations to invest in private partnerships focused on a broad range of private capital strategies.

Wilshire Private Markets manages approximately \$8.5 billion in assets under advisement/management. We have a global perspective on the private markets with worldwide research capabilities and a major international client base. Both global and regional mandates are structured to meet client investment objectives. Today there are more than 40 professionals in Wilshire Private Markets working in four locations: Santa Monica (Western US), Pittsburgh (Eastern US), Amsterdam (Europe), and Hong Kong (Asia/Pacific).

Role and Responsibilities:

Wilshire is seeking to recruit an institutional fundraiser to raise assets across WPM's various investment strategies and help expand our growing private markets advisory business. This individual should have a solid understanding of the institutional marketing process, be able to effectively articulate the investment philosophy and strategies of Wilshire, have demonstrated success cultivating a strong network in the marketplace that has resulted in winning mandates, and be equipped to lead the sales process from opening the door to closing the sale, bringing in the necessary management and investment team resources along the way. The role will focus primarily on sophisticated institutional buyers across North America. Existing direct relationships with corporate and public plans, insurance companies, endowments, foundations, and multi-family offices are preferred. The successful candidate will be a self-starter who can identify, prioritize and gain access to new investors within the requisite channels. Familiarity with private equity is required as it is imperative that this individual be familiar with the in-depth due diligence process associated with institutional investor commitments within the private markets. Travel may be extensive at times, particularly around targeted fundraising periods which will require more intensive prospecting.



January 2019 Job Bulletin

Wilshire Associates Inc.

Senior Institutional Fundraiser,
Senior Associate/Vice President (DOE)

Santa Monica, CA or
Pittsburgh, PA

Required Experience and Skills:

- A minimum of five years of experience in an institutional fundraising role with a well-regarded private equity firm, fund of funds, placement agent, real estate firm or private equity investment consultant
- An established track record of raising assets from sophisticated institutional buyers such as endowments, foundations, public & corporate plans, and larger family offices
- Solid theoretical and practical private equity investment knowledge
- Strong business judgment
- The ability to effectively execute a majority of the sales process on his/her own
- A skilled long-term relationship-builder with excellent client-facing instincts

Personal Qualities:

- A self-starter who is hard working and results oriented
- Maturity, polish and personal presence to effectively interface with sophisticated prospects and clients
- Strong verbal and written communication skills - the ability to present ideas with precision and conviction
- A passion for excellence
- An entrepreneurial bent and a “roll-up-the-sleeves” orientation
- Organized, thorough and detail-oriented
- A natural team-oriented individual who is able to partner effectively with other senior colleagues
- Must be comfortable with travel which can be extensive at times, particularly around targeted fundraising periods
- Easygoing and able to work well with different personality types and with colleagues across functions and global geographies
- A high degree of integrity and professionalism

Required Education:

- Bachelor’s degree

Preferred Education:

- Strong academic credentials
- An advanced degree (e.g., MBA) and/or professional designation (e.g., CFA) is preferred

Our Offer:

- An international, dynamic, entrepreneurial work environment
- Competitive compensation package, including a bonus opportunity
- 3 weeks of vacation, 8 paid holidays per year



January 2019 Job Bulletin

Wilshire Associates Inc.

Senior Institutional Fundraiser,
Senior Associate/Vice President (DOE)

Santa Monica, CA or
Pittsburgh, PA

Our Offer (cont'd):

- 401(k)/Roth 401(k)/Medical/Dental/Vision insurance

How to apply: Please apply directly at www.wilshire.com. No phone calls please.

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January 2019 Job Bulletin

Wilshire Associates Inc.

Vice President, Relationship Manager

Pittsburgh, PA

Job Description:

Wilshire Associates Incorporated is seeking an investment professional for a relationship management position to join the Wilshire Private Markets (WPM) Group. The ideal candidate will possess a combination of investment skills and prior experience interacting with a sophisticated institutional client base.

WPM is a global private markets solutions provider, managing commingled discretionary fund of funds, customized separate accounts, and non-discretionary mandates. WPM currently advises on over \$10 billion of institutional capital, including investments in private partnerships, direct co-investments and secondary limited partnership interests with a focus on buyouts, venture capital, distressed strategies and real assets. This individual will be a member of the WPM U.S. investment team, working closely with senior management of the division.

Responsibilities Include:

- Managing institutional client relationships either in a lead or supporting capacity
- Manage internal processes and deliverables across a broad array of clients globally
- Frequent interaction with WPM institutional clients to provide WPM reports and work product, and assisting with specific information requests
- Contributing member of WPM investment team, with responsibilities throughout the investment process
- Acting as key member of deal teams, with responsibilities for sourcing potential investment opportunities, conducting due diligence and drafting investment memorandums for fund investments and transactions (e.g., co-investments and secondaries)
- Completing special project assignments

Preferred Experience and Skills:

- Candidate should possess at least 5 years of relevant experience, including a combination of investment skills and client-facing experience
- Dedication to excellent client service
- Outstanding written and oral communication skills
- Excellent analytical skills (both quantitative and qualitative)
- High proficiency in Microsoft Office
- Ability to work independently and as part of a broader team in a fast-paced environment with a special attention to detail

Required Education:

- BA/BS in finance, economics, or business related studies



January 2019 Job Bulletin

Wilshire Associates Inc.

Vice President, Relationship Manager

Pittsburgh, PA

Preferred Education:

- MBA and/or CFA, CAIA (or progress towards designation preferred)

Benefits:

- Competitive compensation including a bonus opportunity
- 3 weeks of vacation & 8 paid holidays per year
- 401(k)/Roth 401(k)/Medical/Dental/Vision & Life insurance

How to apply: Please apply directly at www.wilshire.com. No phone calls please.

Wilshire Associates Incorporated is an Equal Opportunity Employer, Minority/Female/Disability/Veteran. Wilshire Associates Incorporated is an SEC registered investment adviser and required to track certain political contributions under Rule 206(4)-5. As such, you may be required to disclose your prior political contributions.



January 2019 Job Bulletin

Wilshire Associates Inc.

Associate Vice President,
Global Client Group

Santa Monica, CA

Job Description:

Wilshire's Funds Management Division (WFM) is looking to add an Associate Vice President responsible for ownership of all channel and division-specific marketing projects including planning, development, communication, execution and measurement of initiatives. This position reports to the head of WFM's Global Client Group.

Day-to-day, this individual will work across several of WFM's key initiatives and clients, playing an integral role in delivering value-added marketing support across a range of applications, including standard and custom pitchbooks, fact sheets, brochures, and website content. This individual will lead the execution of marketing programs from inception through completion, collaborating with stakeholders across the organization.

Key Responsibilities:

- Deploy successful marketing campaigns and own their implementation from concept to execution
- Produce valuable and engaging financial advisor facing content for a variety of distribution channels, including our website
- Build and manage a rich content/editorial calendar, including product fact sheets, client approved marketing pieces, and value-added collateral
- Measure and report performance of marketing campaigns and assess against goals
- Maintain a high level of professional conduct ensuring that all WFM compliance and firm policies are adhered to
- Be organized and diligent in tracking progress toward business objectives and coordinating with appropriate WFM home office staff

Desired Skills and Background:

- Bachelor's degree in Marketing or related field
- 5-10 years marketing experience, preferably in the financial services industry
- Understanding of asset allocation, investment vehicles and capital markets
- Experience designing complex marketing programs and reporting on results
- Proven experience in devising and leading marketing campaigns
- Strong communication skills, both written and verbal, and the ability to identify, cultivate and maintain relationships
- Demonstrated project management skills
- Ability to adapt to a changing environment and change focus and priorities as a result



January 2019 Job Bulletin

Wilshire Associates Inc.

Associate Vice President,
Global Client Group

Santa Monica, CA

Our Offer:

- An international, dynamic, entrepreneurial work environment
- Competitive compensation package, including a bonus opportunity
- 3 weeks of vacation, 8 paid holidays per year
- 401(k)/Roth 401(k)/Medical/Dental/Vision insurance

How to apply: Please apply directly at www.wilshire.com. No phone calls please.

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January 2019 Job Bulletin

Wilshire Associates Inc.

Client Service Senior Analyst,
Associate

Santa Monica, CA

Job Description:

Wilshire Funds Management (WFM) is looking to add a Senior Analyst/Associate to its Global Client Group. WFM provides a full range of outsourced investment advisory services to leading insurance companies, broker dealers, asset managers, RIAs and family offices. This position reports to a Vice President of WFM's Global Client Group.

The Client Service Senior Analyst/Associate will be an integral member of the Global Client Group, providing support to the team's senior professionals. This role is suited for individuals with 2-4 years of professional working experience. The position comes with high visibility and will provide the successful candidate with significant interaction within and across the firm. We are looking to identify self-motivated candidates with a solid academic background, enthusiasm for working in the investment industry, and strong professional drive.

Key Responsibilities:

- Support the team's senior professionals in all aspects of client servicing including generating quantitative analysis, designing and preparing client-specific quarterly reports, fund/market commentary, talking points, and webcast materials
- Perform reconciliation of investment holdings (equity and fixed-income) and characteristics on Wilshire's proprietary systems
- Calculate investment performance for Wilshire portfolios and their corresponding benchmarks; audit portfolio returns for accuracy
- Prepare and execute trade files; liaise with fund companies and custodians to ensure smooth trading
- Understand Wilshire's product offerings and operational structure to allow for effective response to client inquiries
- Assist with the development and production of sales and marketing collateral

Desired Skills and Background:

- Bachelor's degree required. Related disciplines (i.e. Finance, Business, Economics, Accounting) are preferred
- 2-4 years of relevant work experience preferred
- Advanced quantitative/analytical ability and Excel skills required
- Prior experience with investment holdings reconciliation is desired; ability to analyze and interpret characteristics associated with investment holdings
- Prior experience calculating investment performance and analyzing performance attribution is preferred; ability to identify and resolve performance dispersions
- Strong communication skills, both written and verbal, and the ability to identify, cultivate and maintain relationships



January 2019 Job Bulletin

Wilshire Associates Inc.

Client Service Senior Analyst,
Associate

Santa Monica, CA

Desired Skills and Background (cont'd):

- Superior attention to detail and excellent organizational skills; ability to multi-task and work under tight deadlines
- Prior experience with investment applications; prior knowledge of Morningstar Direct and/or Bloomberg is an advantage
- Candidate must be collaborative, a team player, extremely client-centric, and possess a strong integrity and professionalism

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January 2019 Job Bulletin

Wilshire Associates Inc.

Senior Analyst

Pittsburgh, PA

Background:

Wilshire Associates Incorporated is a global investment advisory firm that offers customized, institutionally based solutions to meet the investment needs of our clients. Wilshire's Consulting division, established in 1981, is well known and respected for providing investment consulting services to large pension funds, endowments, foundations and insurance companies. Wilshire's Consulting clients include some of the world's largest fund sponsors with combined assets totaling nearly \$1 trillion.

Wilshire Associates' Consulting Division is seeking qualified candidates for a Senior Analyst that would work on an established consulting team, based in Pittsburgh, PA. The key responsibilities and requirements for this position are as follows:

Investment Responsibilities:

- Coordinate the preparation and review of performance reports to be distributed to clients
- Assist with special projects. Topics are likely to include asset allocation, investment structure, manager evaluations, and selection/termination.
- Participate in Investment Research projects
- Frequent communication with clients and Client Board/Committee presentation development and delivery

Required Qualification and Skills:

- Undergraduate degree (preferably in finance, accounting, math, or equivalent).
- 2-3 years relevant experience.
- Strong written, verbal, and quantitative analysis skills.
- Knowledge of investments and financial markets.
- Ability to work independently with limited supervision as well as in a team environment
- Ability to manage multiple projects concurrently
- Attention to detail and ability to work with deadlines
- Proficiency in Microsoft Office tools (Word, PowerPoint, Excel)
- Experience with electronic data retrieval from a number of sources including databases, data providers, and websites. Candidates should be comfortable manipulating diverse data sources/formats and relational database technology.

Preferred Qualification and Skills:

- Progress toward CFA or MBA is preferred.



January 2019 Job Bulletin

Wilshire Associates Inc.

Senior Analyst

Pittsburgh, PA

Our Offer:

- An international, dynamic, entrepreneurial work environment
- Competitive compensation package, including a bonus opportunity
- 3 weeks of vacation, 8 paid holidays per year
- 401(k)/Roth 401(k)/Medical/Dental/Vision insurance

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January 2019 Job Bulletin

Wilshire Associates Inc.

Investment Associate

Santa Monica, CA

Job Description:

Wilshire Associates has four business units; Wilshire Consulting, Wilshire Analytics, Wilshire Funds Management and Wilshire Private Markets (“WPM”). Since its founding in 1972, Wilshire Associates has evolved from an investment technology firm into a global advisory company specializing in investment products, consulting services, and technology solutions. We have maintained throughout our history our strong commitment to our clients and have worked to retain our position of leadership in providing innovative ideas to the investment industry.

WPM is a global private markets solutions provider, managing multi-investor discretionary funds, customized separate accounts and non-discretionary advisory services. WPM invests in private partnerships, direct co-investments and secondary limited partnership interests with a focus on buyouts, venture capital, private credit and private real assets, and currently manages and advises on approximately \$8.5 billion of institutional capital. We have offices in the United States, Europe, and Hong Kong.

Responsibilities:

- Contributing member of WPM investment team with responsibilities throughout the investment process
- Acting as key member of deal teams with responsibilities for sourcing potential investment opportunities, conducting due diligence and drafting investment memorandums for fund investments and co-investments
- Ongoing monitoring of existing investments
- Completing special project assignments

Preferred Experience and Skills:

- Candidate should possess 3-5 years of relevant investment experience within the private markets
- Outstanding written and oral communication skills
- Excellent analytical skills (both quantitative and qualitative)
- High proficiency in Microsoft Office (particularly Excel)
- Ability to work independently and efficiently under time pressure in a fast-paced environment with a special attention to detail

Required Education:

- Bachelor’s degree preferably from top-tier school

Our Offer:

- An international, dynamic, entrepreneurial work environment
- Competitive compensation package, including a bonus opportunity



January 2019 Job Bulletin

Wilshire Associates Inc.

Investment Associate

Santa Monica, CA

Our Offer (cont'd):

- 3 weeks of vacation, 8 paid holidays per year
- 401(k)/Roth 401(k)/Medical/Dental/Vision & Life insurance

How to apply: Please apply directly at www.wilshire.com. No phone calls please.

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