



**USC** University of  
Southern California

## Investment Director Job Description

### JOB INFORMATION

<i>Job Code:</i>	113825
<i>Job Title:</i>	Investment Director
<i>FLSA Status:</i>	Exempt
<i>Supervisory:</i>	May supervise staff, student, temporary or resource workers.
<i>Job Family:</i>	Investments
<i>Job Family Group:</i>	Accounting, Finance and Banking
<i>Management Level:</i>	7 Individual Contributor

### JOB SUMMARY

Has responsibility for managing the university's internal endowment portfolios and its investment managers, and other aspects related to the investment of the university's financial assets. Provides oversight and supervises investment analysts, managers and interns.

### JOB QUALIFICATIONS:

#### Education

<i>Req</i>	<i>Pref</i>	<i>Degree</i>	<i>Field of Study</i>	
X		Bachelor's degree		
	X	Master's degree	Business Administration	
	X	Specialized/technical training	Accounting	

#### Additional Education

**Check here if experience may substitute for some of the above education.**

<input type="checkbox"/>	Combined experience/education as substitute for minimum education
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#### Work Experience

<i>Req</i>	<i>Pref</i>	<i>Work Experience</i>	<i>Experience Level</i>	
X		7 years		
	X	10 years		

#### Additional Work Experience

**Check here if education may substitute for some of the above work experience.**

<input type="checkbox"/>	Combined experience/education as substitute for minimum work experience
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#### Knowledge, Skills and Abilities

<i>Req</i>	<i>Pref</i>	<i>Functional Skills</i>
X		Comprehensive understanding of the capital markets, investment theory and be able to apply knowledge to the development of portfolio management strategies.
	X	Experience at another endowment/foundation, pension fund, consultant or fund of funds in both public and private markets.

## Other Job Factors

### JOB ACCOUNTABILITIES

	% Time	Essential	Marginal	N/A
Develops and recommends to the Investment Committee on overall asset class investment strategy. Monitors adherence to the Investment Policy Statement and the manager's Investment Guidelines. Recommends changes as appropriate.				
Identifies, evaluates and recommends new managers, including conducting due diligence and preparing investment memorandums. Also, keeps abreast of new managers of interest.				
Monitors and manages existing investments in assigned asset classes. This includes reviewing and analyzing all investment activity and performance in all accounts under external and internal management on a monthly or quarterly basis, as required.				
Develops and sustains relationships with peers, investment managers and potential investment managers. This may require travel including attending annual manager meetings, conducting on-site manager meetings and attending select industry conferences.				
Researches and analyzes other asset categories and investment vehicles to determine suitability for investment by the university. Works with Chief Investment Officer in conducting asset allocation studies. Participates in the determination of overall investment strategy for all portfolios.				
Works with the Risk Officer to analyze risk metrics for various investment strategies and collectively for the endowment.				
Interacts with other areas of the university as required (e.g. Office of the Senior Vice President, Finance and Chief Financial Officer; Office of University Advancement; General Counsel; Restricted Fund Accounting, etc.)				
Makes buy/sell decisions for and ensures the proper recording of gifts received from donors. Works with the general counsel's office to ensure university compliance with SEC rulings on all gifts of restricted securities.				

### Other Requirements

<i>Essential:</i>	<i>Emergency Response/Recovery</i>	<i>Essential:</i>	<i>Mandated Reporter</i>
	In the event of an emergency, the employee holding this position is required to "report to duty" in accordance with the university's Emergency Operations Plan and/or the employee's department's emergency response and/or recovery plans. Familiarity with those plans and regular training to implement those plans is required. During or immediately following an emergency, the employee will be notified to assist in the emergency response efforts, and mobilize other staff members if needed.		A mandated reporter who in his or her professional capacity has knowledge of, or reasonably suspects a person who is under the age of 18 years, elderly, or a dependent adult has been the victim of abuse or neglect must report the suspected incident. The reporter must contact a designated agency immediately or as soon as practically possible by telephone or in writing within 36 hours. By virtue of the associated job duties, this position qualifies as a mandated reporter as required by state law and USC's policy at: <a href="https://policy.usc.edu/mandated-reporters/">https://policy.usc.edu/mandated-reporters/</a>
<i>Campus Security Authority (CSA)</i>			<i>Essential:</i>
By virtue of the associated job duties, this position qualifies as a Campus Security Authority as required by law and USC's policy at: <a href="https://dps.usc.edu/alerts/clery/">https://dps.usc.edu/alerts/clery/</a>			No

### ACKNOWLEDGMENTS

The above statements reflect the essential and non-essential functions as necessary to describe the principle contents of the job. They are not intended to be a complete statement of all work requirements or duties that may be required of the position. I understand that I may be asked to perform other duties as assigned. USC reserves the right to add or change duties at any time.

The University of Southern California is an Equal Opportunity Employer. USC prohibits discrimination on any basis protected under federal, state, or local law, regulation, or ordinance or university policies. All employment decisions are based on individual qualifications and business need.

I acknowledge receipt of this job description and its associated physical requirements. I have read and understand the job description and job requirements and agree to abide by their contents. I realize that duties may be requested of me that are

not specifically stated herein. I understand that I will be expected to adjust to potential fluctuations in work volume. I understand that, if I have any questions about the essential functions or expectations of my position, my supervisor and/or HR partner are available to discuss them with me.

\_\_\_\_\_  
Print Employee Name

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Print Manager Name

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

This job description describes the general nature and level of work required by the position. It is not intended to be an all-inclusive list of qualifications, skills, duties, responsibilities or working conditions of the job. The job description is subject to change with or without notice, and Management reserves the right to add, modify or remove any qualification or duty. Nothing in this job description changes the existing at-will employment relationship between the university and the employee occupying the position.