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## Auburn University Job Description

Job Title:	<b>Endwmnt Investment Analyst</b>	Level I	Grade FO09 \$48,700 - \$82,800
Job Code:	<b>KD08</b>	Level II	Grade FO10 \$54,800 - \$93,200
FLSA status:	Exempt	Level III	Grade FO11 \$59,500 - \$107,100

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### Job Summary

Provides analysis and monitoring of portfolio manager and investment consultant performance, asset allocation, risk management, and overall market conditions in support of the endowment pools of Auburn University and Auburn University Foundation.

### Essential Functions

1. Performs ongoing due diligence on AU's total endowment pool investment performance and endowment fund managers, analyzing investment performance and investment manager operations.
2. Performs risk management and price testing.
3. Calculates and posts annual financials (pool earning distribution, management fees, etc) relating to AU and AUF endowment pool earnings.
4. Prepares, updates, and maintains a wide variety of investment worksheets for internal monitoring and review by external auditors.
5. Acts as a liaison between Auburn University Office of Development, its related entities, and brokers to facilitate the receipt and sale of security gifts from donors.
6. Originates and gathers a variety of reports, documents, and agreements to be utilized by university constituents, outside agencies, and other relevant parties.
7. Assists in audits, attends committee meetings, and provides overall support to the Endowment Investment Office as needed.

### Supervisory Responsibility

May be responsible for training, assisting or assigning tasks to others. May provide input to performance reviews of other employees.

*The above essential functions are representative of major duties of positions in this job classification. Specific duties and responsibilities may vary based upon departmental needs. Other duties may be assigned similar to the above consistent with the knowledge, skills and abilities required for the job. Not all of the duties may be assigned to a position.*

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## Auburn University Job Description

### Job Family Levels

Level	Responsibility	Knowledge	Education and Experience*
I	Under immediate supervision, performs standard tasks using established methods, principles, concepts and procedures related to a specialized field. Judgments are made on routine matters of relatively small impact.	Knows fundamental concepts, practices and procedures of particular field of specialization.	Bachelor's degree in discipline appropriate to position with no experience.
II	Under close supervision, performs varied duties and assignments involving some judgment. Resolves routine questions or problems, referring only complex issues to higher level. Some evaluation, originality and ingenuity required.	Knows and applies fundamental concepts, practices, and procedures of particular field of specialization, with awareness of related fields.	Bachelor's degree in discipline appropriate to position plus 2 years experience. Experience must include at least 2 years at the preceding level or equivalent.
III	Under minimal supervision, performs complex assignments and fulfills broad responsibilities where required outcomes are defined, but methods and procedures may vary based on professional judgment or precedent. Considerable latitude for unreviewed action. Confers with supervisor on unusual matters. Coordinates the work of others on projects and may assign work to and assist less experienced professionals or support staff. May act in an advisory capacity to managers or faculty.	Possesses and applies a broad knowledge of principles, practices and procedures of a particular field of specialization to the completion of difficult assignments. Also possesses knowledge of related fields and areas of operation which affect, or are affected by, own area.	Bachelor's degree in discipline appropriate to position plus 4 years experience. Experience must include at least 2 years at the preceding level or equivalent.

\* See the "Minimum Required Education and Experience" section of the job description for any substitutions that may be allowed for education and experience.

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### Minimum Required Education and Experience

- Level I** Bachelor's degree in discipline appropriate to position with no experience.
- Level II** Bachelor's degree in discipline appropriate to position plus 2 years experience. Experience must include at least 2 years at the preceding level or equivalent.
- Level III** Bachelor's degree in discipline appropriate to position plus 4 years experience. Experience must include at least 2 years at the preceding level or equivalent.

#### Focus of Education

Degree in Finance, Accounting, or related field

#### Focus of Experience

Experience in accounting, finance, and investment services

#### Substitutions allowed for Education:

Indicated education is required; no substitutions allowed.

#### Substitutions allowed for Experience:

When a candidate has the required education, but lacks the required experience, they may normally apply additional appropriate education toward the experience requirement, at a rate of one (1) year relevant education per year of required experience.

#### Minimum Required Knowledge

See Job Family Levels

#### Certification or Licensure Requirements:

None Required

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### Physical Requirements/ADA

No unusual physical requirements. Requires no heavy lifting, and nearly all work is performed in a comfortable indoor facility.

Routine deadlines; usually sufficient lead time; variance in work volume seasonal and predictable; priorities can be anticipated; some interruptions are present; involves occasional exposure to demands and pressures from persons other than immediate supervisor.

Job frequently requires sitting, talking, hearing, handling objects with hands, .

Job occasionally requires standing, walking, reaching, climbing or balancing, stooping/kneeling/crouching/crawling, and lifting up to 25 pounds.

Vision requirements: Ability to see information in print and/or electronically.

Date: 1/12/2015

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