



## Boyden Executive Search Contact

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### Position Summary

The Investment Team for the Texas A&M Foundation advances Texas A&M University by maintaining the spending power of the Foundation's long-term asset base through balanced strategy actively focused on the preservation and growth of capital. The Assistant Director of Investments plays an integral role in the investment decision-making process assisting with the execution of investment strategies, monitoring risk and compliance, and developing portfolio analytics. This investment professional helps evaluate investment managers, formulate recommendations, and prepare presentations for investment policies, strategies, and objectives for the Chief Investment Officer, CEO, and the Investment Committee of the Texas A&M Foundation Board of Trustees.

### Essential Functions & Major Responsibilities:

#### Long-Term Investment Strategy

- Work with the Chief Investment Officer (CIO) in designing and executing long-term investment policy, strategic objectives, portfolio construction, strategy and guidelines and investment manager selections and due diligence to build a fully integrated portfolio - a portfolio that is well diversified, leverages sophisticated construction, and incorporates collaborative decision making.
- Enable a balanced, and globally diversified portfolio that extends beyond the traditional asset allocation focus, inclusive of more tactical execution elements of portfolio construction and risk management by incorporating diversification by geography, investment style, market size, etc. as well as standard and non-standard risk factor assessments.
- Assist in performing analysis and generating recommendations concerning engaging and terminating the appropriate use of investment consultants, custodians, managers, and other outside resources.
- Participate, and lead where appropriate, in the selection process of investment managers, custodians, and other experts across the portfolio and within specialized asset classes, identifying, meeting, and evaluating each to make recommendations to the CIO and Investment Committee according to the Aggie Way investment philosophies.
- Negotiate contracts with selected managers, working with legal counsel.

- Assist in developing methodologies for identifying, measuring and mitigating risk exposures related to investment process and manager specific activities.

### **Reporting & Compliance**

- Develop and prepare investment reporting protocols.
- Monitor, assess and report on performance measurement, in compliance with accepted industry standards, and attribution analysis of investments.
- Prepare reports and presentations on the performance and risk exposures of the funds and asset classes including preparations for quarterly Board meetings and monthly investment committee calls.
- Monitor the portfolio of existing investments to ensure compliance with the terms of the agreement, as well as other contracts and expectations and analyzing the performance of existing investments.
- Actively monitor portfolio risk and exposures, make recommendations on changes.
- Stay abreast of domestic and international economic and market trends in order to evaluate investment opportunities and recommend changes as appropriate.

### **Relational and Collaborative Engagement**

- Attend suitable training, relevant conferences and educational sessions to gain exposure to market insights and develop industry awareness through networking with peers.
- Develop and maintain strong working relationships within the Foundation and across the investment industry focused on leveraging, building, and maintaining strong working relationships to increase investment performance and knowledge sharing across the stakeholder base.
- Build long-lasting relationships with principled partners as an effective way to access best ideas and opportunities as well as an efficient means of extending the investment team's resources well-beyond College Station.
- Foster a positive, respectful work environment reflective of the Foundation's core beliefs and Aggie Core Values to create a team culture of engagement, empowerment, and accountability.
- Collaborate with Marketing & Communications team in developing and implementing a shareholder engagement strategy.

### **Additional Duties**

In addition to essential functions & major responsibilities, the position also includes the duties listed below:

- Participate in the establishment and attainment of personal, departmental, divisional, and organizational goals and objectives in support of the mission, vision, and goals of the Foundation.
- Perform special projects and initiatives as assigned.

**General Position Requirements:****Supervision Duties**

This position does not have direct supervision or management responsibilities. May provide guidance and assignment of tasks to student workers and Investment Analysts. Provides indirect leadership through collaborative efforts.

**Working Hours**

The position is an exempt level position with a standard work schedule of 40 hours during core business hours Monday through Friday 8:00 a.m. – 5:00 p.m. The position may require weekend and evening hours.

**Travel Requirements**

Frequent travel (including overnight stays, weekends, and evenings) may apply requiring the ability to visit stakeholders in offices or other agreed locations is a requirement of the position.

**Physical Demands**

Ability to sit for long periods of time at a personal computer performing work related functions. May require occasional physical exertion such as long periods of standing, recurring bending, crouching, stooping, stretching, reaching, lifting or similar activities.

**Education, Training, & Experience:****Minimum Required Qualifications**

- Bachelor's degree in finance, accounting, business administration, economics, or related technical field.
- 5+ years' work progressive experience in the investment industry with demonstrated performance in positions requiring excellent analytical and problem-solving skills, business judgement, curiosity, innovation, and ability to access and question portfolio dynamics.
- Student of the markets with a solid fundamental understanding of a wide range of asset classes, financial instruments, and investment strategies as well as portfolio level activities including asset allocation, modern portfolio theory, manager analysis; and strong understanding of portfolio construction.
- Demonstrated performance in positions requiring excellent analytical and problem-solving skills, business judgement, curiosity, innovation, and ability to access and question portfolio dynamics.
- Proven performance in portfolio management and fund manager due diligence exhibiting sound judgement and perspective in managing private portfolios.
- Ability to anticipate and evaluate the implications and consequences of situations and take appropriate action to be prepared for possible contingencies.
- Strong written, verbal, and interpersonal communication skills, including excellent critical thinking skills possessing the ability to articulate complex information with influence, discretion and diplomacy.
- Strong initiative and sense of accountability with an ability to balance process and innovation aligned with the Foundation's organizational principles and the Investment Team's Aggie Way cultural values.

- Teambuilder with the ability to work within a small team fostering effective peer and mentoring relationships and the ability to build strong external relationships within the marketplace.
- Proficiency in MS Office applications.

**Preferred Qualifications**

- Advanced degree in finance, accounting, business administration, economics, or related technical field.
- 7+ years' progressive work experience in the investment industry progressing through elevated roles and increased responsibilities.
- Chartered Financial Analyst (CFA) or other rigorous professional certification in the investment or finance industry.
- Demonstrated professional experience as an investor in a similar organization to Texas A&M Foundation.

*Notice: This position description is not designed as a comprehensive listing of all activities, duties or responsibilities that are required of the position. Nor does it create an employment contract, implied or otherwise, other than an "at will" employment relationship.*

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**About Boyden**

Founded in 1946, Boyden global executive search was the first firm to focus entirely on retained executive search. Others would soon follow, using many of the basic tenets and principles that Sidney Boyden put in place: maintaining a strict code of ethics and standards; establishing a global presence; creating uniform processes; and working with highly experienced business partners. These aspects of Sidney Boyden's vision are still in use today.

Boyden continues to be a leader in the executive search industry. Through the ever-expanding use of cutting-edge technology, while always adhering to strict ethical standards, we remain true to our rich heritage as the founders of retained executive search. We cover the globe with over 70 offices in more than 40 countries, led by resident professionals adept at working in a global economy. We are poised to help our clients find the people who will lead them today and into the future. In addition to retained executive search, Boyden works with clients seeking advice regarding their Boards. We also assist clients with interim management and leadership assessment.

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