



## Job Announcement

**Position:** Investment Officer  
**Reports to:** Chief Investment Officer  
**Hours:** 37.5 hours per week  
**FLSA Status:** Exempt

### About Meyer:

One of the largest private funders in Oregon, Meyer Memorial Trust commits its position, resources and energies to dismantling barriers to equity in education, housing and the environment, and to improve community conditions so that all Oregonians can reach their full potential.

Established in 1982 at the behest of the late Fred G. Meyer, founder of a chain of retail stores bearing his name throughout the Pacific Northwest, Meyer has awarded more than \$720 million in grants and program-related investments to more than 3,320 organizations in Oregon and Southwest Washington. Meyer has focused its grantmaking to better align with its mission: to work with and invest in organizations, communities, ideas and efforts that contribute to a flourishing and equitable Oregon. Partnering with regional funders and working alongside Oregon nonprofits, Meyer relies on a mix of strategic, proactive and responsive investments — including grants, loans, initiatives, commissions for research, support for policy advocacy and a range of community and nonprofit engagement strategies — to help achieve its mission.

With current assets of approximately \$775 million, Meyer is five years into an equity journey that has reshaped the organization and grantmaking, and helps Meyer identify and respond to the worst inequities underpinning education, housing, the environment and community building.

Our founder, Fred G. Meyer, was a man ahead of his time. The values that guided him — to innovate, take risks, embrace diversity, adapt to changing circumstances, contribute to economic development and parity and to develop the power of the mind — continue to create and inform the culture of the foundation he established, influencing what we do and how we do it. Learn more about Meyer, the visionary and his legacy, at [mmt.org](http://mmt.org).

### Position Summary

Generally, the investment office at Meyer is responsible for managing and monitoring all investment activity, working with external investment partners and maintaining good relationships with internal and external stakeholders.

This position will support, and work closely with, the Chief Investment Officer in four broad categories: 1) investment manager selection and oversight; 2) stakeholder engagement and management; 3) performance benchmarking and measurement; 4) general research and administrative support.

## Typical Responsibilities

The role requires an individual with strong analytical, written and verbal communication skills, good understanding of accounting and a working knowledge of the markets. The individual must be capable of multitasking and collaborating with other members of the team and across divisions.

As a member of the team, the individual will routinely be conducting quantitative and qualitative evaluation, analyzing information and generating various investment related reports (cost, peer & social responsibility) and gathering and compiling portfolio risk information.

The position will also assist the Chief Investment Officer with leading due diligence processes for new investments. Due diligence reporting to include but not limited to: Investment summary, cash flow summary, risk/return analysis, General Partner exposure, liquidity summary, maintain details of redemption terms and changes to terms.

The position will also be the lead interface with the operating finance team at Meyer.

## Other Responsibilities

- Attend manager meetings, client conferences and annual meetings in lieu of or in attendance with the Chief Investment Officer;
- Maintain files for investments, manage the preparation of all legal documents relating to funds, write up recommendation memos;
- Complete investor questionnaires;
- Lead 'what-if' modeling for prospective managers;
- Design and maintain investment contacts database; and
- Take responsibility for all cold calls.

## Experience and Educational Requirements

- MBA or BA in finance, investments, or a quantitative field of study; CFA (Chartered Financial Analyst) designation will be considered;
- Three years' experience;
- An understanding of investment products/risks and the asset allocation modeling process;
- Strong quantitative and analytical skills that demonstrate the ability to produce reliable analysis to help guide decision-making;
- Must be adaptable, self-starter, able to work independently but participate as a team player, organized, detail oriented, professional, commitment to accountability and transparency;
- Proven project management skills and the ability to multi-task in a fast-paced environment;
- Excellent writing skills;
- Good oral communication, problem solving and presentation skills required to effectively manage internal and external relationships;
- Working knowledge of MS Word and PowerPoint;
- High level mastery of MS Excel;
- Capability to work with password-protected manager websites for diligence and performance measurement;
- Willingness to learn; and
- Commitment to accountability and transparency.

## Equity Expectations

- Offer personal interest and commitment to working in a diverse and inclusive work environment that places a high value on equity;

- Participate in promoting a positive workplace culture of collaboration, innovation and respect. Excellent interpersonal skills and ability to establish effective working relationships in a multi-cultural, multi-ethnic environment (please refer to [Meyer's Equity Statement](#)); and
- Engage in equity trainings and serve on related work groups as needed.

### **Physical Demands/Work Environment**

The physical demands and work environment described are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the responsibilities of this job, the employee is expected to travel extensively; and will be frequently expected to move throughout the Trust offices and use/operate office-related equipment. Therefore, willingness to travel, physical mobility, stamina and general good health are job requirements.

*Meyer Memorial Trust is committed to the principles of equal employment opportunity and compliance with all federal, state and local laws concerning employment discrimination, including the Americans with Disabilities Act. To this end, Meyer ensures equal opportunity to all employees and applicants regardless of race, color, age, gender, sexual orientation, religion, marital status, national origin or ancestry, citizenship, lawful alien status, physical, mental and medical disability, veteran status or liability for service in the United States Armed Forces.*

### **Start Timeframe**

We seek to have a candidate in place by Fall 2017 or position will remain open until filled.

### **Compensation**

Salary commensurate with experience.

### **Rewarding Benefits**

We offer a comprehensive benefit package; Medical, Dental, a Flexible Spending Account (F.S.A.) or Health Savings Account (H.S.A.), a generous 401(k) plan employer match plus discretionary, vacation, tuition reimbursement and multiple transportation options for the active commuter.

### **To Apply**

***No telephone inquiries, please.*** Interested candidates are invited to use MS Word or Acrobat Reader (.pdf) and please use the following email address: [investmentofficerjob@mmt.org](mailto:investmentofficerjob@mmt.org)

Please remit a cover letter describing your interest in, and qualifications for, the position, highlighting how your experience and competencies meet the position's requirements and a current resume.

### **Application Deadline**

To be considered, Meyer must receive applications no later than 5:00 p.m. Pacific Time on **Thursday, August 31, 2017.**