

## Join us as an Investment Analyst

Brown Brothers Harriman is currently recruiting an Investment Analyst to join our Investment Research Group (IRG), which is broadly responsible for manager selection, asset allocation, and other investment decisions on behalf of the Private Bank, which manages approximately \$55 billion in assets. The Investment Analyst will be responsible for assisting IRG in researching, analyzing, and tracking existing/potential managers; performing prospective manager due diligence; and communicating findings to BBH Private Banking relationship teams supporting Multi-Family Office (MFO) and Endowment & Foundation (E&F) clients.

This position involves: (1) monitoring the existing portfolio of managers, including gathering and reporting on monthly/quarterly performance and portfolio data from the managers; (2) gathering and analyzing manager and capital markets data; and (3) interacting with existing and potential investment managers for the MFO and E&F investment platforms. Other responsibilities may include manager due diligence and supporting relationship teams with data and information requests related to the investment offering.

### Some of your key responsibilities include:

#### 1. Manager Due Diligence & Investment Analysis

- Prepare for and participate in manager meetings, including annual reviews of existing managers.
- Prepare summary memos documenting meeting discussions and key takeaways in a timely basis.
- Assist with due diligence efforts such as researching and visiting investment firms, building models to aid in investment manager decision-making, participating in reference calls, and assessing the manager's motivations.
- Actively engage in IRG investment discussions and decision-making processes
- Support IRG with research related to new manager selection.
- Produce, analyze, and distribute quarterly and monthly analysis, including monthly performance, monthly holding reports, and monthly attribution commentary.
- Monitor existing manager positioning and performance across all asset classes.
- Conduct thorough and meticulous data-driven portfolio and peer analysis.

#### 2. Reporting & Relationship Management

- Support MFO and E&F relationship teams by providing information related to the investment offering and assisting with data and other information requests or projects.
- Draft communications for MFO and E&F relationship teams including, but not limited to: 1-pagers that summarize key data for each manager, top 10 investment holdings summaries, and Ad Hoc commentary (think: performance update, moved to watch list, personnel turnover, etc.).
- Update all client and prospective client collateral.

#### 3. Asset Allocation

- Contribute to the team's asset allocation and portfolio construction research efforts.
- Monitor and analyze portfolio exposure data for relevant policy portfolios.

#### 4. General

- Support group with other miscellaneous and/or ad-hoc investment-related research projects.
- Prepare for, and attend, various internal BBH investment-related meetings (e.g., Private Bank Investment Oversight Group meetings).
- Serve as an avid reader, staying informed of industry trends and research papers, highlighting areas of interest to the rest of the team.

## Qualifications:

- BA or Equivalent
- 2+ years of relevant professional experience
- Experience with Microsoft Office Products, particularly Excel, required
- Exceptional data analysis and written/verbal communication skills
- Strong attention to detail
- Strong interpersonal skills
- Demonstrated interest in and passion for investing
- Demonstrated ability to work in a team environment in a collaborative way
- Strong quantitative and qualitative analysis skills
- Strong conceptual and critical thinking skills
- Highest level of integrity and professional standards
- CFA/CAIA designation, or progress towards, a plus

## What We Offer:

- A collaborative and high performing team that values intellectual curiosity and independent thought
- A culture of inclusion that values each employee's unique perspective
- Opportunities to grow your expertise and take on new challenges
- High-quality benefits program emphasizing good health, financial security, and peace of mind
- Rewarding work with the flexibility to enjoy personal and family experiences at every career stage
- Volunteer opportunities to give back to your community and help transform the lives of others
- Investment in tailored professional development opportunities
- An environment that enables you to step outside your role to add value

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## Interested?

- Please send your resume to Justin Reed at [justin.reed@bbh.com](mailto:justin.reed@bbh.com).