



NEW HAMPSHIRE CHARITABLE FOUNDATION

Investment Analyst

Date of Last Revision: 08/29/2023

Title Group: Analyst

- Guides the deployment of solutions to improve business processes
- Has no responsibilities for performance management of staff

Department: Finance

Reports to: Chief Investment and Financial Officer (CIO/CFI) Status: Full-time/Exempt

About the New Hampshire Charitable Foundation

The New Hampshire Charitable Foundation is New Hampshire's statewide community foundation, founded in 1962 by and for the people of New Hampshire.

We are the place where generosity meets the dedication and ingenuity of nonprofits and the potential of New Hampshire students. For six decades, thousands of people have entrusted their charitable resources to the Foundation, creating a perpetual source of philanthropic capital and making it possible for the Foundation to award more than \$60 million in grants and scholarships every year. We have a staff of 54 passionate and dedicated professionals working across the state, and are governed by a highly engaged Board of Directors.

The Foundation's purpose is to make New Hampshire a more just, sustainable and vibrant community where everyone can thrive. Our current strategic plan, [*Together We Thrive*](#), is focused on advancing equity, racial justice, and economic security. That's because when a community can draw on the potential, strength, ingenuity and grace of every person in it, that community will be healthier, happier, more prosperous and a better place to live for all.

The Foundation recently committed to aligning all invested assets with mission. This marks a period of change for the Foundation's investment program as we integrate considerations of sustainability, racial equity, and impact investments into the process. With clear goals and an evolving strategy, the Foundation needs additional capacity to help realize this transition while also carrying out core investment functions.

Position Summary

The Investment Analyst is a member of the team responsible for managing the Foundation's approximately \$1 billion in assets. The team is led by the Foundation's CIO/CFI, includes staff from the Finance and Community Engagement and Impact departments, and is supported by an investment consultant (Cambridge Associates). The Foundation manages over 50 investment portfolios spanning the spectrum from sustainable and impact-oriented investments to traditional investments.

The Analyst will be responsible for working with colleagues to (i) oversee and manage the Foundation's investments, (ii) assess current and potential investment managers, (iii) prepare for and support volunteers and committees charged with governance of investments (Foundation's board and investment committee), (iv) advance the Foundation's sustainable and impact investment priorities and (v) complete related projects. The Foundation's investment path is considered at the leading edge for community foundations nationally, and the Analyst will have the opportunity to be a strategic partner in this ongoing work.

Essential Job Functions and Responsibilities

Oversee and Manage the Foundation's Investments

- In collaboration with the CIO/CFO, closely monitors the Foundation's investment portfolios.
- Prepares portfolio updates and analytical reports.
- Works with CIO/CFO and Controller to support the quarterly close process and annual audit of investment valuations.
- Assists in preparation of portfolio investment performance, asset allocation, and risk reports.
- Oversees the Foundation's advisor-managed investment program
- Assists in the development and maintenance of financial models for analyzing the investment portfolio and its exposures, risk and cash flow profiles.
- Manages and maintains portfolio technology systems.

Assess Current and Potential investment managers and direct impact investments

- Leads and/or supports due diligence on new and existing investments
- Liaises with investment managers and the investment consultant.
- Captures and maintains manager and market data to support the manager close process for financial statement preparation.
- Prepares documents for managements' signature including investment agreements and subscription and redemption documentation.
- Supports account maintenance activities including opening new accounts, address changes, online enrollment, etc.

Prepare for and support volunteers and committees charged with governance of investments (Foundation's board and investment committee)

- Assists in preparation of portfolio investment performance, asset allocation, and risk reports
- Coordinates committee material preparation with the CIO/CFO.

Advance the Foundation's sustainable and impact investment priorities

- Partner with the investment team to advance the Foundation's sustainable and racial-equity lens investing goals.
- Works with both the Finance and Community Engagement and Impact departments to ensure integration of the Foundation's impact themes into the Foundation's investments.
- Participates in New Hampshire investment ecosystem of community development financing entities, banks, nonprofits, etc. to identify potential impact investments.
- Manages and monitors impact reporting for the Foundation's investments.
- Identifies technology and process-improvement opportunities and leads implementation as needed.

Other Projects

- Provides research, analytical, and organizational support to the CIO/CFO for projects and ad hoc requests.
- Handles cash management activities including acting as a support for investment funding requests, monitoring cash balances and resolving issues as needed.
- Performs other duties as assigned

Essential Knowledge, Skills, and Attributes

- Experience with investment management, banking or other relevant field.
- Experience with sustainable and impact investing
- Excellent analytical and problem-solving skills
- Discretion and ability to handle confidential issues.
- Action-orientated and entrepreneurial self-starter who can work well independently and in teams.
- Ability to work independently and handle multiple priorities and deadlines simultaneously.
- Excellent written and oral communication skills.
- Demonstrated ability to work with colleagues and external contacts by building trust and credibility.
- Welcomes feedback as a means to personal and professional growth.
- Broad understanding of equity and social justice issues.

Job Characteristics

- Shared office environment based in Concord, NH with the option of a hybrid schedule.
- May require long periods of time at a computer.
- Night and/or weekend work may be required.
- Travel around the state and nationally may be necessary; may require travel to meetings and conferences with overnight travel possible.

Essential Qualifications

- A combination of education and experience equivalent to the needs of the role.
- Strong computer skills in a variety of computer applications, including MS Office products, as well as advanced spreadsheet skills.
- Valid driver's license.

Organizational Life

- Participates in the Foundation's organizational life, including improvement teams, and events as required.
- Belief in the mission and purpose of the New Hampshire Charitable Foundation.
- Positively demonstrates the values and contributes to the culture of the Foundation.
- Demonstrates a commitment to community and the well-being of New Hampshire.
- Interacts professionally with other employees and external stakeholders.
- Follows all company policies and procedures, as well as all local, state and federal laws concerning employment.
- Contributes to a safe and productive environment.

Essential job functions and requirements are subject to possible modification to reasonably accommodate individuals with disabilities.

This job description is intended to convey information essential to understanding the scope of the job and the general nature and level of work performed by job holders within this job. However, this job description is not intended to be an exhaustive list of qualifications, skills, efforts, duties, responsibilities or working conditions associated with the position. This job description is general and may evolve over time. The description is subject to periodic updating. At management's discretion, the employee may be assigned different and/or additional duties or responsibilities.