

## INVESTMENT ASSOCIATE

**BRANDYWINE GROUP ADVISORS  
NEW YORK, NY**

<http://www.brandywinetrust.com/>

### Summary

The Investment Associate will be part of a ten-person investment team that manages approximately \$12 billion in assets on behalf of long-term minded and concentrated U.S.-based families. The Investment Associate will report to a senior-level Investment Managing Director and will have exposure to a broad range of asset classes, including public and private equity and hedge funds, and geographies.

### Firm Background

Brandywine Group Advisors (BGA), located in New York City, engages in asset allocation and manager selection similar to an endowment or foundation, with a focus on total return and a very long-term investment horizon. In terms of investment performance, it allocates capital to and maintains strong relationships with world-class managers and, as a result, its investment returns have exceeded relevant benchmarks by a significant margin. BGA also gains insight and strategic guidance from a highly experienced Investment Committee.

BGA is part of the Brandywine Trust Group, which was founded in 1989 to provide fiduciary and investment services to a limited number of families, including the founder's, the objective being to achieve scale and professionalism in the management of the families' affairs while preserving their independence from large financial institutions. Brandywine's clients have substantial assets and long term, equity-oriented investment goals.

### Responsibilities

BGA seeks a highly motivated professional to provide analytical, research, and investment process support to a tight-knit team of generalist investment professionals. The Investment Associate will be a key part of the team, working with them to monitor and shape BGA's investment portfolio across multiple asset classes.

The Investment Associate will have primary responsibility for the portfolio analytics used to monitor existing investments and evaluate future opportunities. To that end, the Investment Associate will perform rigorous qualitative and quantitative analysis of existing managers and pools/ asset classes. In this effort, the Investment Associate will also drive quality and process improvement to refine appropriate reporting and monitoring tools. Responsibilities will include, but are not limited to:

- Performing due diligence on new and existing managers across asset classes
- Analyzing portfolio performance, exposures, and liquidity; clearly and concisely communicating key conclusions of analysis to the team
- Helping build/ refine and maintain the analytical infrastructure needed to efficiently track key information on the portfolio and underlying managers

- Using appropriate research tools to enhance analysis on new investment strategies and opportunities
- Attending meetings and conference calls with current and prospective investment managers
- Assisting in the preparation of reports that are required by the Investment Committee or for client families
- Contributing to special projects as they arise

This position offers the successful candidate an extraordinary opportunity to apprentice at a highly successful and stable investment platform. The Investment Associate will have the opportunity to learn and deepen various skills including gaining an understanding of multiple asset classes, fund manager and opportunity monitoring and assessment, and portfolio management more broadly. The candidate may potentially, in time, be promoted to an Associate Investment Director role, depending entirely on the candidate's investment acumen, business judgment, and ability to gain the respect and confidence of the CIO and team.

### Qualifications

It is critical that the Investment Associate enjoys working closely with a collaborative team with one common goal, where all members “pitch in” without hesitation. The successful candidate will have superb analytical ability, outstanding oral and written communication and interpersonal skills, and a strong desire to learn about institutional investing. The Investment Associate must be a self-starter with the willingness to bring high energy, creativity, and resourcefulness to this position which demands the highest quality work product. As a member of a small team, the successful candidate must have the ability to handle multiple projects and priorities with attention to detail. Finally, the candidate must have a sense of humor and the highest level of integrity.

The successful candidate will have 1 to 4 years—or more—of post-undergraduate work experience and all undergraduate fields of study will be considered.

### Compensation and Benefits

Brandywine offers a competitive compensation package commensurate with experience. Brandywine also offers excellent benefits, including fully paid medical, dental, and vision insurance, commuter benefits, charitable gift matching, and a 401(k) plan with employer matching. In addition, all employees have the option to work remotely on a regular basis.

***Interested candidates should email their resume to Scott Newman, Brandywine's COO, at [snewman@bganyc.com](mailto:snewman@bganyc.com)***