

# Chief Investment Officer Position

## Position Overview:

Single Family Office looking for experienced Chief Investment Officer to oversee and grow a diversified portfolio of assets.

## Responsibilities:

The primary responsibility of this position is to set strategy for all investment functions of the family office while overseeing, monitoring and optimizing the diversified portfolio of assets for one family. Responsibilities for this key position include, working with a small number of family office executives and external partners in making asset allocation and investment decisions for the portfolio to be presented to the CEO for consideration, implementing those decisions and monitoring the portfolio and investment managers within the portfolio. The Chief Investment Officer will report to the CEO, an active family member, and work with other family office investment executives to determine the strategic investment goals and priorities for this single-family office. This individual refine the family office Investment Policy Statement and strategies to optimize the portfolio to successfully accomplish the goals of the office. A secondary set of activities for the CIO will include support in the direct private equity co-investment and minority investment activities of the office. A summary of the key responsibilities of the position includes:

### Investing-

- Responsible for execution of all investment related goals and priorities;
- Monitor and update the Investment Policy Statement (IPS) as needed;
- Monitor and review investment allocation, strategies and performance on an ongoing basis to ensure alignment with IPS; proactively identify and make recommendations for changes as appropriate; help manage the various entities, trusts, partnerships, etc. within the family office;
- Work with the CEO to determine private equity co-investment and minority investment objectives while managing the current ones;
- Oversee the investments and investment managers of the family office while monitoring and optimizing the investment portfolio across all entities;

### Source new deals-

- Oversee sourcing of new deals, both through identifying opportunities and vetting opportunities presented to the family;
- Build upon the current network and his/her relationships to source new investment ideas and potential managers; identify synergistic opportunities to leverage resources and optimize portfolio performance;
- Selectively attend industry and family office conferences; proactively network, establish and leverage relationships with other family offices and industry contacts to identify new co-investment opportunities; vet and recommend potential co-investments and minority investments appropriate for the portfolio;
- Be pro-active in seeking out alternative deals and investments;

#### Process-

- Monitor the portfolio management platform and processes to ensure achievement of the family's long-term goals; determine relevant investment platform infrastructure requirements; maintain controls to ensure the efficient operation of the investment function; streamline reporting of results to members of the office, monitoring and reporting of the portfolio;
- Create investment memos for any new investments in the portfolio;
- Work with external legal counsel to review relevant contracts and agreements; negotiate and monitor consultant and manager fees and commitments/agreements; conduct liquidity analyses/projections with the office controller and define and implement portfolio planning to ensure efficiency;
- Work closely with investment consultant(s) and the CEO to create, implement and monitor optimal structures for relevant investments that take into account tax and estate planning considerations and other factors;
- Identify member investment related needs, issues and opportunities; recommend appropriate solutions;

#### Research and Report-

- Create comprehensive investment research from both a macro and micro level, due diligence and selection process across all relevant asset classes;
- travel as appropriate to visit investment managers;
- formally review and evaluate investment manager performance; challenge ideas and maximize the level of service provided by investment consultant(s) and outside managers;
- communicate and advise the CEO regarding significant macroeconomic and capital market trends and issues

#### Qualifications:

The successful candidate will be an experienced investment professional who has proficiency and a demonstrated investment track record of success across a broad spectrum of asset classes both public and private. The individual should be able to work in a small office and be a self-starter with an entrepreneurial spirit. The ideal candidate will also have experience managing significant investment portfolios. The ideal candidate must have the intellectual capacity, communication/interpersonal skills and professional integrity to lead the family office portfolio investment function and to represent the family positively with all constituencies, internally and externally. The ideal background will include:

#### Skills-

- Demonstrated skills and experience in strategic asset allocation and investment management for individuals, family partnerships, trusts and other entities; demonstrated track record of success in constructing and managing client investment portfolios;
- Proven track record of success in managing investment due diligence processes and in coordinating internal and external resources (accounting, legal, investigative, custodian, consultant, etc.);
- Strategic and tactical thinker who anticipates issues, such as changing macroeconomic trends and global markets, and recommends actions/solutions on a proactive basis; inquisitive mind/nature;
- Working knowledge about all areas of wealth management (investments, tax, trust, estate planning, legal, etc.); adept in advising family clients on investment and financial issues and opportunities to enable family clients to make well-informed decisions;
- Strong understanding of financial and investment reporting; working knowledge of legal, accounting and tax considerations related to investments;

- Demonstrated leadership abilities; flexible and adaptable with a “roll-up-your-sleeves” approach and mentality; works collaboratively to achieve objectives; outgoing, businesslike personality;
- Strong common sense and judgement; self-confident individual who is able to see multiple sides of an issue, engage in interactive discussion and provide objective recommendations with conviction to support decisions; diplomatic in interactions;
- Intellectually curious; strong investment, financial and business acumen;
- Highly motivated, results oriented individual with a commitment to excellence and continuous improvement; high EQ and self-awareness; and
- Honest; high integrity; maintains utmost confidentiality and discretion; exhibits the presence, poise and professionalism to represent the family/family office effectively in all interactions.

#### Educational Requirements-

- Undergraduate degree; advanced degrees and/or professional certifications preferred (MBA, JD, CFA);

#### Experience-

- Minimum of 15 years of relevant investment experience, including working in a multi or single family office; investment experience should include all aspects of the investment process, including investment policy, asset allocation, due diligence, analysis, multi-asset class manager/strategy selection, portfolio management and ongoing portfolio monitoring;
- Have wide-ranging connections of family offices, private equity, venture firms, hedge funds, asset managers, endowments, banks and brokerages;
- Strong thematic investment acumen and understanding of investment concepts and strategies; broad exposure across all asset classes, including in-depth knowledge and experience in alternative investments;
- Prior experience working with/advising family office clients or ultra-high net worth family principals; has worked within a small less structured environment which requires greater organization and motivation; understands and can relate well to family office clients and their unique needs; highly proactive approach to anticipating and serving client needs;

#### ***The Location:***

Nashville, TN, United States

#### ***Compensation:***

An industry competitive package will be offered, including a comprehensive benefits plan and co-investment opportunities. All applicants are subject to background checks.

#### ***Applying:***

All qualified applicants can apply by e-mailing [familyofficeopenjobs@gmail.com](mailto:familyofficeopenjobs@gmail.com).