

Investment Analyst

Overview

The Investment Analyst is an integral part of a small team investing Cook Children's approximately \$4 billion foundation with a focus on public equities, hedge funds, commodities, bonds, private equity, venture capital, natural resources, and real estate opportunities across the globe through active managers. We anticipate hiring a candidate that has achieved an excellent academic record, displays intellectual curiosity and has a strong work ethic. Our team consists of eight members based in Fort Worth, TX.

This is a two-year program with a third year earned based upon strong performance. After two or three years, analysts have numerous career avenues including graduate school, buy-side investment firms such as hedge funds or venture capital firms, or continuing their careers at an endowment or foundation. This program typically begins in June or July.

Key Duties and Responsibilities

- Participate in meetings with existing and prospective investment managers, developing quantitative and qualitative evaluation of investment opportunities, and preparing investment recommendations for the team
- Monitor prospective and existing investments by analyzing and synthesizing data, performance and exposures of individual managers, asset classes, and the overall portfolio and articulate key findings and trends
- Assist in researching and analyzing both existing and prospective investment opportunities.
- Prepare written and analytic materials that present and support investment recommendations and actions
- Assist with and participate in regular reviews of the portfolio, including analysis of the portfolio's performance and investment characteristics
- Maintain database integrity, organization, and data content. Ensure timely updates of key data items in databases and investment monitoring systems
- Maintain qualitative and quantitative manager information across databases for existing and prospective managers
- Stay current on changes across capital markets
- Provide support to team members on assorted projects. Conduct ad hoc projects (e.g., research on specific countries or sectors) as necessary
- Other duties as assigned

Basic Qualifications

- Demonstrated interest in finance and passion for investing
- Strong and demonstrated quantitative and analytical skills
- Strong orientation to detail and accuracy and excellent organizational skills
- Strong writing and communication skills
- Intellectual curiosity and ability to think critically
- Must be proactive and open to new challenges
- Demonstrated ability to be a self-starter, multi-task, and work well both independently and as a member of a team
- Comfortable and highly capable with Microsoft Excel, analyzing large amounts of data
- Familiarity with MS Word, PowerPoint, and Outlook
- Able to travel as needed (0-40%)

Education and Experience

The full-time position requires a bachelor's degree. Pursuit of the Chartered Financial Analyst (CFA) designation is a plus, but not required. One to three years of work experience in a finance-related role, either at an endowment or foundation, investment bank, equity research role, consulting, or public market-oriented investment fund is desirable but not required.

About Cook Children's

Cook Children's Health Care System embraces an inspiring Promise – knowing every child's life is sacred, to improve the well-being of every child in our care and our communities. Based in Fort Worth, Texas, we're proud of our long and rich tradition of serving our community for over 100 years.

Our not-for-profit organization encompasses nine companies – a medical center, two surgery centers, a physician network, home health services and a health plan. It also includes Child Study Center at Cook Children's, Cook Children's Health Services Inc., and Cook Children's Health Foundation. With more than 60 primary, specialty, and urgent care locations throughout Texas, families can access our top-ranked specialty programs and network of services to meet their unique needs.

We've worked to improve the health of children from across our primary service area of Denton, Hood, Johnson, Parker, Tarrant and Wise counties for more than 100 years. Based on the exceptional care we provide, patients travel to Cook Children's from around the country and the globe to receive life-saving pediatric care built on leading technology, extraordinary collaboration and the art of caring.

For more information, visit cookchildrens.org

Applying

Please email your resume and cover letter to Drew Smith at drew.smith@cookchildrens.org.