THE LYNDE AND HARRY BRADLEY FOUNDATION

# JOB TITLE: Vice President for Investments STATUS: Exempt

# REPORTS TO: President DATE: August 2016

# Position Summary:

This position is responsible for the investment management oversight of the Foundation’s investment portfolio.

# Responsibilities Include:

* Establishes investment policy guidelines as approved by the Finance Committee.
* Determines appropriate asset allocation based on the Foundation’s spending policy and risk tolerance.
* Hires and terminates individual investment managers.
* Reviews and monitors investment manager performance and adherence to investment policy guidelines.
* Meets with investment managers semi-annually to assess performance.
* Develops monthly and quarterly investment performance reporting format to be used in presenting data to the Finance Committee.
* Prepares for and leads quarterly meetings with the Finance Committee.

**Other Duties and Assignments:**

Other duties as may be assigned by the President to fulfill the responsibilities of this position.

**Work Relationships and Scope:**

This position reports directly to the President of the Bradley Foundation. Regular contact with the Vice President for Finance. Occasional contact with board members. Frequent contact with investment managers and financial professionals. Attends board and Finance Committee meetings.

## **Measures of Performance:**

Quality, quantity, accuracy, timeliness and thoroughness of work performed; ability to handle multiple projects at one time; effectiveness of communications and development of good working relationships with co-workers and investment managers: profess ional workplace appearance and conduct; understands and adheres to Foundation policies and procedures; ability to keep Foundation information confidential.

**Knowledge, Skills and Abilities:**

Bachelor’s degree in Finance or Accounting, CPA or MBA a plus, with at least ten years of investment management experience. Must be an effective communicator, both verbal and written, ability to anticipate trends in the economy and finance, ability to articulate and present viewpoints and recommendations, detail oriented and accurate.

## **Working Conditions:**

Work is performed in a pleasant office environment with minimal exposure to injury.

### **Acknowledgement:**

This job description describes the general nature and level of work performed by employee assigned to this position. It does not state or imply that these are the only duties and responsibilities assigned to the job. The employee may be required to perform other job-related duties as requested by the Vice President for Finance or President. All requirements are subject to change over time and to possible modification to reasonably accommodate individuals with a disability.

Employee Signature Date