

POSITION:

Senior Consultant

FIRM:

Pension Consulting Alliance, LLC (PCA) is an independent, full-service investment consulting firm providing a broad range of investment advice to a wide variety of institutional investors. PCA currently advises 35 clients with assets totaling more than \$1.3 trillion. Investment consulting is PCA's only line of business.

THE POSITION:

The position is a senior-level consultant whose role is multi-faceted, requiring both technical investment finance capabilities and strong interpersonal/relationship skills. The senior-level consultant is expected to work closely and collaboratively with other PCA staff to meet the needs of existing clients, acquire new business, and maintain high customer satisfaction. The person in this position should be able to fully engage existing and prospective clients in order to manage and expand client accounts and firm revenue. The person who fills this position is also expected to show capable team leadership, largely through exemplary servicing and team-oriented efforts.

It is expected that the person filling this position will evolve toward having senior responsibility for account servicing of specific clients. The senior-level consultant will be able to handle and address complex client issues and make sound recommendations while mentoring and providing feedback internally to team members working on specific projects. While the position is generalist in nature, it is expected that the senior consultant will have competency and in-depth knowledge of non-standard investment strategies (e.g., long/short strategies, strategies utilizing various leverage approaches, structured investments, etc.).

As a lead interface across our clients, the senior consultant should be able to develop exceptional solutions for our clients. Such contributions will occur because the senior-level consultant is an excellent communicator, highly-knowledgeable in investment finance, understands the pulse and trends of the investment markets, and is an empathetic listener to client concerns and issues.

Base Salary Range	Competitive base + bonus structure, dependent on experience
Other Benefits	Standard PCA issued insurance coverage + 401K eligibility + discretionary bonus
Term	Full time
Team	General Practice Group
Location	Portland, Oregon

RESPONSIBILITIES

- Develop a broad understanding of PCA capabilities and expertise.
- Become a trusted advisor for assigned large-scale clients and prospects.
- Build and maintain effective and sustainable relationships with clients.
- Coordinate and collaborate with team members across PCA to bring the full capabilities of PCA to the client and ensure a streamlined client experience.

- Work closely with PCA team members to determine appropriate investment strategies and structures for clients.
- Act as a team leader and contributor on a range of projects for PCA clients, including asset allocation/liability studies, multi-manager portfolio structuring, manager searches, topical research, and other efforts.
- Facilitate communication between the client and service team members while overseeing the quality of deliverables and enforcing critical deadlines.
- Manage existing revenue and profit streams while seeking new and recurring business.
- Ensure client satisfaction through proactively monitoring and addressing any issues.
- Actively develop and mentor talent, providing direction, feedback and coaching.
- Understand the objectives of clients and lead the development of custom solutions to address those needs.
- Discuss expectations and performance with clients and monitor overall client satisfaction.
- Develop the scope of service levels and compensation for specific services and take the lead in pricing of services.
- Negotiate pricing/fees and ensure client relationships are secure and financially sound.
- Present renewal proposals to existing clients and proposal responses for prospective clients.
- Function as a visible leader in the investment consulting marketplace and actively participate in associations and organizations, as appropriate.
- Support manager selection exercises, checking for inconsistencies and ensuring the client's needs are being addressed.
- Supporting changes to the investment manager arrangements occur on time and in the most appropriate manner.
- Producing, checking or reviewing reports containing investment advice.
- Contributing to client meeting preparation, as needed.

MINIMUM QUALIFICATIONS:

- Strong verbal and written communication skills
- Organized with strong attention to detail
- Ability to problem-solve and work independently as well as collaboratively
- Ability to be receptive to differing opinions and changing business needs
- Strong analytical skills
- Ability to manage and model data
- Time management and project management skills
- Strong basic computer proficiencies in the Microsoft Office Suite (Excel, Word, Access, PowerPoint, Outlook)
- Knowledge of investment finance concepts and terms
- Demonstrated capability of negotiating terms and conditions of complex investment vehicles

Training and Experience:

- 10 or more years of relevant experience working in or closely with the institutional investment consulting industry.
- Demonstrated ability as a team-oriented professional who has worked collaboratively with colleagues.
- Demonstrated experience and ability capturing, building, and maintaining multiple client relationships.

- Demonstrated competence in both traditional and non-traditional investment areas, with a solid understanding of various account structures/vehicles utilized by clients to gain appropriate exposures.
- Demonstrated competence in quantitative finance, including coding in R, MATLAB, Python, C++, VBA, or other similar computer languages.
- Undergraduate degree required; relevant advanced degrees and/or professional designations are highly beneficial

Physical Demands:

- Travel is expected to range from 20% - 33% of typical work week.

Environment:

PCA uses a highly collaborative work process to develop ideas and deliver robust, innovative analysis to its clients. The candidate should have the abilities to work in a deadline-driven environment with strong team orientation and a demonstrated collaborative style. PCA strives to offer its employees opportunities for growth and encourages employees to maintain a healthy work-life balance.

Disclaimer: This job description is designed to outline the functions and position requirements of this job. It does not identify all tasks that may be expected, nor address the performance standards that must be maintained.

PCA is an equal opportunity employer.

Please send a cover letter and resume to: erikahanson@pensionconsulting.com