



CornerStone Partners Associate, Portfolio Management

Job Summary

CornerStone's Portfolio Management team serves as the interface between clients' investment policies, objectives, and portfolios and our investment process. As a Portfolio Management Associate, you will play a pivotal role supporting the Portfolio Management Team in effectively managing client portfolios and relationships. Your primary responsibilities will be to coordinate resources across the firm to help the team manage institutional multi-asset class portfolios and communicate strategy and results to client boards and committees. You will assist in constructing, analyzing and monitoring investment portfolios, ensuring adherence to investment guidelines and objectives and will work closely with senior portfolio managers, analysts, and other stakeholders to provide valuable insights to enhance investment decision-making processes and performance results.

The successful Investment Associate will master existing processes, proactively recommend and implement improvements, and grow into a key contributor on the Investment Team in portfolio management. The successful candidate will be highly organized and detail oriented, with the ability to multi-task in a dynamic environment and possess a passion for investing to support the missions of non-profit clients.

Future growth opportunities within the Portfolio Management team could include increased client interaction, participation in the investment manager underwriting process, and a path to continued promotion within the team. In addition to functional training, we support a variety of continuing education opportunities, including financial support of the CFA Program. This position requires the candidate to spend 2 days per week with team members in CornerStone's Charlottesville office.

Core Responsibilities

Upon completion of training, you will have a wide range of responsibilities, including:

- Coordinating resources across the firm to support Portfolio Managers in managing institutional multi-asset class portfolios and meeting client needs
- Creating presentation content for client boards and committees that effectively communicates portfolio information and investment strategy
- Participate in client meetings, including collaborating on agenda and communication strategies. Occasional travel required to meet with clients
- Assist with portfolio rebalancing
- Assist with maintaining data for exposure analysis, risk management, and other processes necessary for portfolio management
- Support the client onboarding process and implementation of an investment program to meet individual client needs
- Special projects, such as:
 - Analysis and presentation to clients and internal team on portfolio-related topics (e.g., maintaining purchasing power, impact of different variables on capital market assumptions/asset allocation)
 - Finding and implementing ways to improve efficiency of portfolio management processes

Attributes of the Successful Candidate

- Adaptable
- Responsive
- Collaborative
- Highly organized
- High integrity
- Intellectual curiosity

Required Skills/Abilities

- Knowledge of various asset classes (equities, fixed income, alternatives) and financial markets
- Strong communication skills (written, verbal, and visual presentation)
- Highly proficient in PowerPoint, Excel, and Word
- Ability to prioritize and manage multiple workstreams with a proven ability to meet deadlines
- Problem solving
- Detail-oriented

Experience/Credentials

- 3+ years of work experience (note: finance, investment, management consulting, or related industry experience preferred)
- Minimum BA, BS or equivalent

CornerStone Partners

CornerStone Partners, based in Charlottesville, Virginia, serves as the outsourced investment manager (OCIO) for nonprofit organizations. Our clients rely on the returns generated by their investment portfolios to fund their missions in health, education, conservation, and building and improving communities, and hire CornerStone to manage their investment program. The firm manages approximately \$18 billion (as of November 1, 2023) and has 31 employees. CornerStone is a dynamic, growth-oriented firm committed to developing a diverse and equitable workforce.

To Apply

Please submit a resume and cover letter by visiting our Careers page at www.cstonellc.com/careers and click "Apply for Open Positions." Applications will be reviewed as they are received, and we will be conducting interviews until the position is filled. CornerStone is not able to sponsor employees who would require a visa to work in the U.S.

Contact Susan Holtzman, HR Manager, with any questions about the position or to learn more about CornerStone Partners at careers@cstonellc.com.