

# Wafra

## Job Description

**Position:** Associate, Executive Advisory & Research

### About Wafra:

Wafra Inc. is a leading global investment firm currently managing approximately \$28 billion in assets and commitments across a variety of asset strategies. Behind our investment strategies are talented professionals, principally in New York and other financial centers, who bring expertise and experience to deliver strategic, reward-focused solutions. Wafra seeks to provide long-term investment return solutions that span not just years, but generations.

### Position Description:

The Executive Advisory & Research (“EAR”) team is seeking an Associate for immediate hire. The Associate will be responsible for working alongside more senior members of the EAR team on project-specific engagements and recurring business activities. The EAR team has three focuses within the firm: Consulting Services, Portfolio Solutions and Research. Internal consulting engagements are strategic in nature and focus on projects supporting the needs of the CEO and the company’s senior management. Portfolio Solutions involves designing tailored investment solutions for institutional clients, from managing end-of-life closed-ended funds to outsourced chief investment officer (OCIO) services. Research projects focus on producing white papers and due diligence support. The Associate position will report directly to the Senior Managing Director who heads EAR and support other team focus areas.

In addition to supporting Wafra’s senior leadership in defining and executing the firm’s strategic agenda, EAR provides external consulting services for sovereign wealth and pension funds, including our parent institution, on a range of topics, such as asset allocation and investment analysis, product strategy, and capabilities building. The team operates in an entrepreneurial environment and is continuously seeking new ways to expand our compelling service offering to create value for our clients. The ideal candidate will have a background in pension or management consulting, financial institutions group (FIG) investment banking, or investment company management.

### Duties and Responsibilities:

- Provide recommendations to Wafra’s senior management on a range of strategic and operational topics
- Author white papers on current topics suitable for sovereign wealth and pension CIOs
- Prepare market and industry research reports covering multiple asset classes
- Prepare detailed economic and financial models to support management decision making
- Work collaboratively on short-term “quick response” projects as well as long-term strategic projects
- Own individual workstreams on multi-functional projects
- Proactively contribute to the team’s ongoing business development activities

*This description reflects management’s assignment of essential functions; it does not proscribe or restrict the tasks that may be assigned. Wafra Inc. is an equal opportunity employer.*

- Prepare presentations and financial analyses for C-Suite and communicate findings both verbally and written
- Perform other duties as assigned

**Requirements:**

- Bachelor's degree
- 1-2 years of experience with a pension or management consultant, asset manager or investment bank
- Knowledgeable with financial statement analysis and modeling
- Ability to perform Monte Carlo, multiple regression, and financial analyses
- Strong computer skills - proficiency in Microsoft Office Suite is required
- Programming proficiency in Python or Visual Basic within a finance or investing context is highly desired
- Excellent organizational, presentation and communication skills
- Strong problem assessment and problem-solving skills
- Knowledgeable of aspects of alternatives investing strategies
- Ability to work collaboratively in a team environment
- Must be flexible, adaptable, and intellectually curious

Please send your resume to [earrecruiting@wafra.com](mailto:earrecruiting@wafra.com) with the subject line "Associate"