



Investment Analyst Intern Position Profile

THE COMPANY

Whittier Trust Company and The Whittier Trust Company of Nevada, Inc. (collectively “Whittier Trust”) are, respectively, California and Nevada state-chartered trust companies with over 125 wealth management professionals and offices in South Pasadena, Costa Mesa, San Francisco, Reno and Seattle. Whittier Trust provides fiduciary, investment management, philanthropic and ancillary family office services to high net worth individuals and families, and their related trusts, foundations and other entities. Viewed collectively, Whittier Trust is the largest “multi-family office” headquartered on the West Coast and manages and consults on more than \$10 billion in assets for 349 different families with an average account size of nearly \$32 million.

For more information, please visit www.whittiertrust.com.

POSITION SUMMARY

The primary responsibility of the Investment Analyst is to support the functions of the Portfolio Manager(s) and current investment analysts. The objectives are to provide relevant financial analysis and portfolio information to the Portfolio Managers, enhance the ability of the Portfolio Manager in implementing their views in client portfolios and the preparation of exhibits/reports. Advanced Excel skills, analytical and communication skills are prerequisites. Pursuit of the CFA charter may be supported for the right candidate.

ESSENTIAL DUTIES AND RESPONSIBILITIES

include the following. Other duties may be assigned:

- The candidate will support and be mentored by multiple senior team members. Responsibilities include financial model building and updating, market research, and company research.
- Create and generate custom reports for Portfolio Managers to monitor accounts (Bloomberg, internal accounting programs, FactSet, Excel) as directed
- Assist with collecting, synthesizing and organizing equity, fixed income and economic research data
- Maintain and ensure accuracy of financial models. Provide summary of earnings conference calls to Analysts to assist in evaluating recent company performance. Disseminate information to internal departments as applicable.
- Provide research using Bloomberg, FactSet, and other data providers to create reports and graphs for client presentations as directed
- Assist in monitoring client portfolio asset allocation and liquidity
- Assist in analyzing portfolios to ensure they reflect Whittier Trust sector and security outlook
- Assist with implementing portfolio changes across accounts
- Assist in providing oversight to ensure trades are made in accordance with client investment policy statements
- Maintaining and tracking composite performance
- Binding presentation books for existing clients and prospects
- Ad hoc tasks for Portfolio Managers as directed

QUALIFICATIONS

- Strong academic credentials
- Bachelor's Degree in Finance, Accounting, Economics or related field
- Demonstrated experience in financial modeling and analysis
- Excellent quantitative and analytical skills
- Strong interest in stock analysis
- Advanced computer skills using Microsoft Office, with particular expertise in Excel & PowerPoint
- Strong verbal and writing skills

Desired Qualifications:

- 1-3 years of related investment experience
- Knowledge of and experience using FactSet and Bloomberg
- Demonstrated knowledge of financial markets
- Progress towards CFA Level 1 or better a strong plus
- Ability to communicate (orally or in writing) with clients and articulate portfolio holdings, asset allocation and strategy regarding their account
- Strong Excel skills with ability to build analytical models and custom reports
- Familiarity with Bloomberg, FactSet and APX a plus

Resumes and corresponding documentation may be submitted confidentially to hrdept@whittiertrust.com.