

Investment Associate – Alternative Investments – Role Description

ABOUT WE FAMILY OFFICES:

With offices in New York and Miami, WE Family Offices is an award-winning independent, family office firm serving single family offices and ultra-high net worth families. The firm addresses the real-life wealth challenges families face. WE works with each family to help create a unique wealth enterprise to manage their wealth as they would manage a well-run company, helping them to effectively manage, preserve and grow their wealth. WE is an independent advisory firm and is also one of just 30 firms listed on the Institute for the Fiduciary Standard's Real Fiduciary™ Advisor Registry. To underscore their commitment to putting clients' interests first, WE has become a Certified B Corporation, providing external validation of the firm's commitment to balancing profit with purpose.

ASSOCIATE ROLE DESCRIPTION:

The Investment Associate will be part of our firm's Investment Research Team focused on Alternative Investments and report directly to the Head of Alternatives Investment Research. The core responsibilities will be to support the research and due diligence efforts associated with the implementation of our investment process as it relates to investment opportunities in alternative investments, including private equity, venture capital, real estate, credit, real assets and other alternative investments. The role is expected to assume more responsibilities over time based on development and performance, including taking the lead of manager underwriting and presenting to the internal Investment Committee.

ESSENTIAL DUTIES & RESPONSIBILITIES:

- Assist in conducting investment manager research and due diligence
- Review and monitor performance of investment managers
- Assist broader team with inquiries regarding approved investments (ex. close dates, minimum investments, general subscription questions, etc.)
- Ad hoc research projects including capital markets and macro factors
- Assist Advisors in analyzing alternative investments they are offered by third parties
- Various administrative tasks such as tracking investment allocations, scheduling manager meetings, taking meeting notes, maintaining electronic files, etc.
- Develop expertise in technology and tools used for investment analysis
- Draft topical research papers, develop marketing and educational materials, research new asset classes

REQUIRED EXPERIENCE & SKILLS:

- Bachelor's degree required; Master's degree in Finance, Business Administration, Economics or a related discipline preferred
- 2-5 years of relevant work experience in an Analytical Role
- Possess a basic knowledge of alternative investments and investment manager due diligence and a strong desire and motivation to learn
- Excellent communication skills (both written and oral) with the ability to communicate with all levels of the organization
- Comfortable presenting in group settings and have the confidence to express an informed opinion;
- Be self-driven, reliable and able to perform under pressure and with minimal supervision in a small team environment
- Be intellectually curious, inquisitive and have a strong interest in capital markets
- Strong organizational and analytical skills, attention to detail and initiative to improve or design investment-related processes are essential.
- Flexible and adaptable to change;
- Demonstrate maturity, reliability, and pride in one's work
- Proficiency in Microsoft Excel is required, and experience with Evestment/TopQ, Preqin, PivotalPath, Bloomberg, Visual Basic, SQL is a significant plus.

PREFERRED QUALIFICATIONS:

- Ideal candidate will be expected to pursue the CFA qualification and/or Chartered Alternative Investment Analyst (CAIA) qualification;
- Have a basic understanding of Modern Portfolio Theory; Strategic & Tactical Asset Allocation; Investment Manager Selection Processes; and Quantitative Analysis.
- While taking appropriate initiative, the candidate will be able to handle multiple requests and prioritize effectively while maintaining a positive and flexible attitude.
- Bilingual preferred, with the ability to read, write, and speak Spanish proficiently

WE Family Offices, LLC is an equal opportunity employer. Qualified applicants will receive consideration for employment without regard to their race, color, religion, sex, sexual orientation, gender identity, national origin, disability, protected veteran status, disability status, or any other protected characteristic as outlined by federal, state, or local laws.