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**JOB TITLE:** INVESTMENT PERFORMANCE ANALYST  
**DEPARTMENT:** INVESTMENT DEPARTMENT  
**REPORTS TO:** CHIEF INVESTMENT OFFICER  
**CLASSIFICATION:** EXEMPT  
**LOCATION:** DALLAS, TEXAS

*Position will assist with the management of a multi-asset class portfolio through performance analysis and operational support.*

### **WHO YOU ARE**

As an Investment Performance Analyst, you are a part of the investment team and are passionate about working with and serving others. You're proactive and have a high degree of intellectual curiosity. You are open-minded and fluid in adapting to and embracing change, making you the ideal collaborative team player.

#### *Essential duties and responsibilities*

**YOU ARE EXCELLENT AT:**

- Providing accurate performance and attribution analysis for HighGround's portfolios.
- Calculating and verifying client-related investment data and statistics based on investment management records and custodian reports.
- Developing insightful performance analysis and commentary to support internal teams at HighGround.
- Researching and resolving performance discrepancies, reconciling data and validating results.
- Developing and maintaining written performance policies and procedures.
- Reviewing calculation methodologies, researching and updating as required.
- Generating custom reports using a variety of software programs and data vendors.
- Ability to contribute to ad-hoc projects.

#### *Competencies and qualifications*

**YOU HAVE:**

- Bachelor's degree in accounting, finance, economics or mathematics.
- Strong analytical and critical reasoning skills
- Proficiency in data organization, spreadsheet applications and performance management software tools
- An interest in the institutional investment industry and a desire to pursue the CIPM designation.
- Strong communication skills (verbal and written) and the ability to interact with all levels of staff confidently and professionally
- Flexibility and creativity while working with changing priorities
- Strong organizational skills

#### *HighGround has a professional, open office environment*

**INVESTMENT PERFORMANCE ANALYST WORKING CONDITIONS:**

- Routinely uses standard office equipment such as computers, phones, multi-functional copiers and filing cabinets
- Usually sits to complete job functions, but may walk or stand for brief periods (access to sit-to-stand desks for optimal flexibility is provided)

- Must be able to lift up to 5 pounds
- Is required to have close vision, distance vision and the ability to adjust focus
- Is required to have the ability to lift files, open filing cabinets and bend or stand on a stool as necessary
- Is required to work onsite as scheduled and has little to no expected travel

*The above statements are intended to describe the general nature and level of work being performed by the person(s) assigned to this job. They are not intended to be an exhaustive list of all duties, responsibilities and skills required of personnel so classified. Employees holding this position will be required to perform any other duties as requested by management, from time to time in its sole discretion. This updated job description supersedes prior descriptions for the same position. Management reserves the right to add or change duties at any time.*

## **WHO WE ARE**

*Our vision is to Protect, Strengthen and Grow our nonprofit clients and charitably minded families.* We believe there is no pursuit more important than this; because we believe the work we do, now and in the future, will not only shape our lives but will empower the many organizations that truly transform lives. This vision forms an authentic pathway to our mission—to be an innovative and vigilant caretaker of the funds and assets entrusted to us by the nonprofits and generous individuals we serve through effective asset management, gift planning strategies and account support services. It is the outcome we work towards together—to have a greater impact on the world and individual lives. We hope you will decide to join us on this incredible journey.

HighGround is committed to our brand promise and our core values. As such, we expect that you will strive to keep our clients at the center of everything you do, be honest, always remain professional, exhibit humility and think outside of the box as our founders did, who were pioneering and visionary when our journey began in 1930.

HighGround offers a comprehensive benefits package that includes a medical, dental, disability insurance, retirement plan and more, but don't take our word for it, have a look at what other HighGrounders are saying and learn more about our benefits here

<https://www.highgroundadvisors.org/careers>.

*If you are interested in becoming a part of the HighGround team, please email your resume and cover letter to [HR@highgroundadvisors.org](mailto:HR@highgroundadvisors.org).*