

PENSION INVESTMENT ANALYST SENIOR, PENSION INVESTMENT ANALYST &

PENSION INVESTMENT ANALYST ASSOCIATE
Recruitment #1812-5474-001

List Type	Original
Requesting Department	EMPLOYES' RETIREMENT SYSTEM
Open Date	12/11/2018 11:13:00 AM
Filing Deadline	1/1/2019 11:59:00 PM
HR Analyst	Deidre Steward

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INTRODUCTION

The position will be filled at the level of Pension Investment Analyst-Associate (PG 2KX), Pension Investment Analyst (PG 2MX) or Pension Investment Analyst-Senior (PG 2OX) depending upon the qualifications of the candidate and the needs of the Employees' Retirement System. Eligible candidates who successfully complete the selection process will be placed on the highest level eligible list for which they qualify. The eligible lists resulting from this examination may be used to fill similar City of Milwaukee positions.

Located on the western shore of Lake Michigan, Milwaukee is an urban hub bursting with energy. Milwaukee provides a casual sophistication – big city appeal without the big city hassles. We are accessible and affordable, and our residents are welcoming. Milwaukee has evolved through the years, bringing together its unsurpassed old world charm with a breathtaking Art Museum, top-flight arts and cultural attractions, professional sports, lakefront festivals, recreational opportunities, and great restaurants.

PURPOSE

Under the direction of the ERS Deputy Chief Investment Officer, the Pension Investment Analysts monitor performance and compliance relative to the ERS investment portfolio.

ESSENTIAL FUNCTIONS

- Analyze the investment portfolio, portfolio strategy, and potential changes to the strategy.

- Manage the analysis of individual investment managers and or asset classes such as equity, fixed income or real estate.
- For each investment manager, monitor and examine manager performance, individual holdings, risk level, and guideline compliance.
- Prepare quantitative analysis with respect to investment related issues.
- Advise the Chief Investment Officer and assist in answering inquiries and requests of the ERS Board, Investment Committee or other appropriate organizations: Ensure that the ERS management and the ERS annuity and Pension Board are provided with the necessary information and analysis for their investment related decision making.
- Review and evaluate performance, develop appropriate recommendations, and prepare reports.
- Prepare reports for management, the ERS Annuity and Pension Board, and its committees and subcommittees regarding investment matters, investment research results, and special projects.
- Execute and manage special projects related to the investment portfolio.
- Provide financial analytical support to the payment of fees and the financial accounting and budgeting of investments.

Reasonable accommodations requested by qualified individuals with disabilities will be made in accordance with the Americans with Disabilities Act (ADA) of 1990, as amended by the Americans with Disabilities Act Amendments Act (ADAAA) of 2008.

CONDITIONS OF EMPLOYMENT

MINIMUM REQUIREMENTS

1. **All Three levels:** Bachelor's degree in accounting, business, finance, or a closely related field from an accredited college or university.
2. **Pension Investment Analyst-Senior (PG 2OX):** Four years of progressively responsible experience in analyzing investments, financial and quantitative information and preparing written summary reports of findings. Complete levels 1 & 2 of the Chartered Financial Analyst (CFA) requirement at time of appointment.
3. **Pension Investment Analyst (PG 2MX):** Three years of progressively responsible experience in analyzing investments, financial and quantitative information and preparing written summary reports of findings. Complete level 1 of the Chartered Financial Analyst (CFA) requirement at time of appointment.
4. **Pension Investment Analyst Associate (PG 2KX):** Two years of progressively responsible experience performing duties related to analyzing investments, financial and quantitative information and preparing written summary reports of findings.

Equivalent combinations of education and experience may be considered.

IMPORTANT NOTE: College transcripts are required and must be received by the application period closing date. Transcripts should be attached to your online application. Applications without transcripts attached will be considered incomplete and will be rejected. Student/unofficial copies are acceptable; however, your transcript must

DESIRABLE QUALIFICATIONS

- Designation as a Chartered Financial Analyst.
- Experience developing and preparing written summary of investment findings.

KNOWLEDGES, SKILLS, ABILITIES & OTHER CHARACTERISTICS

- Knowledge of investment vehicles, portfolio management theory, and investment processes.
- Knowledge of financial controls, investment accounting, and investment systems at a basic level.
- Knowledge of investment-related analytical and performance monitoring systems.
- Ability to solve and manage problems independently.
- Knowledge of mathematical principles and the ability to make accurate calculations.
- Ability to effectively communicate orally and in writing, especially complex investment concepts.
- Ability to prepare executive summaries and other written communications for senior management and Board of Trustees.
- Ability to read and interpret statistical and actuarial reports.
- Skill in managing large and complex quantities of data and information.
- Ability to think critically and analytically to problem-solve, make decisions and use sound judgement.
- Ability to use spread sheets, word processing, and presentation software.
- Ability to work effectively under pressure and tight time constraints to produce high quality product.
- Ability to perform work with a high degree of accuracy and highly organized.
- Oral communication skills to positively represent the department to individuals and groups both large and small.
- Ability to work cooperatively and effectively with coworkers and citizens whose backgrounds may differ from one's own.
- Ability to exhibit exemplary professionalism.
- Integrity and the ability to maintain complete confidentiality.

CURRENT SALARY

Pension Investment Analyst-Senior (PG 2OX):

- The current salary range for City of Milwaukee residents is \$85,757-\$120,064 annually, and the non-resident salary range is \$83,653-\$117,118.

Pension Investment Analyst (PG 2MX):

- The current salary range for City of Milwaukee residents is \$75,478-\$105,669 annually, and the non-resident salary range is \$73,627-\$103,077.

Pension Investment Analyst Associate (PG 2KX):

- The current salary range for City of Milwaukee residents is \$66,435-\$93,010 annually, and the non-resident salary range is \$64,805-\$90,728.

Appointment above the minimum is possible based upon level of experience and other qualifications and is subject to approval.

The City of Milwaukee provides a comprehensive benefit program that includes the following:

- Defined Benefit Pension Plan
- 457 Deferred Compensation Plan
- Health and Dental Insurance
- Comprehensive Wellness Program
- Onsite Clinic Services
- Onsite Employee Assistance Program
- Alternative Work Schedules
- Long Term Disability Insurance
- Group Life Insurance
- Tuition Benefits
- Paid Vacation
- 11 Paid Holidays
- Paid Sick Leave and other paid leaves
- Flexible Spending Arrangement
- Commuter Value Pass

For full details of the benefits offered by the City of Milwaukee, please visit <http://city.milwaukee.gov/Benefits2018>

SELECTION PROCESS

THE SELECTION PROCESS will be job related and will consist of one or more of the following: education and experience evaluation; written, oral, or performance tests, or other assessment methods. The Department of Employee Relations reserves the right to call only the most qualified candidates to oral and performance examinations. Oral examinations may include written exercises. Selection process component weights will be determined by further analysis of the job.

INITIAL FILING DATE - The examination will be held as soon as practical after **Tuesday, January 1, 2019**. Receipt of applications may be discontinued at any time after this date without prior notice. However, recruitment may continue until the needs of the City have been met. Qualified applicants will be notified of the date, time, and place of the examination. Unless otherwise required by law, the City of Milwaukee will not provide alternative test administration. The applicant is responsible for attending all phases of the job selection process at the time and place designated by the City of Milwaukee.

ADDITIONAL INFORMATION

- APPLICATIONS and further information may be accessed by visiting, <http://city.milwaukee.gov/jobs>.
- If you would like assistance completing an application, please contact the Department of Employee Relations at (414) 286-3751 or staffinginfo@milwaukee.gov.
- The Department of Employee Relations is located at City Hall, 200 E. Wells St., Room 706, Milwaukee, WI 53202

CONCLUSION

EEO 202

The City of Milwaukee values and encourages diversity and is an equal opportunity employer.