CLEARVIEW by KDI
FIDUCIARY ALLIANCE

Position Title: Research Associate
Reporting To: CEO
Employment Status: Part-time/Remote
                         10-20 hours/week (est.)

Background
The ClearView Fiduciary Alliance helps executives and boards of small and mid-size foundations, endowments, and nonprofits make more informed investment decisions on behalf of their organizations. ClearView is a member-based, research-focused learning and teaching organization that assists its foundation, endowment and nonprofit members through education and research. In addition, ClearView provides members with the ability to benchmark their investment performance against a universe of comparable organizations via a "member portal" that provides ongoing access to performance benchmarking data.

Apart from ongoing education and peer analysis, ClearView provides consulting services for its members, including Requests for Proposal (RFP) projects for Investment Advisers and Outsourced Chief Investment Officers ("OCIOs"). Executives and board members face significant challenges in the selection of such advisors and ClearView has successfully undertaken more than 39 RFP projects on behalf of its members, with additional projects currently underway.

As of December 2021, the Alliance includes 73 member organizations across 12 eastern states.   Our members' investment pools range from $1 million to over $400 million, collectively representing over $3.7 billion in investment assets.

ClearView's commitment to diversity includes the recognition that our mission is best advanced through the contributions of people of diverse backgrounds. We encourage applicants from all cultures, races, colors, religions, sexes, national or regional origins, ages, disability status, sexual orientation, gender identity, military, protected veteran status or other status protected by law.

Position Description
The Research Associate will support the CEO and other ClearView staff on a range of analytic and data-related activities in service of ClearView's member-centric mission. The role involves extracting and utilizing financial and other data to prepare spreadsheet analyses, presentations and other documentation that can be used internally or for meetings with members, potential members, or other audiences. At times when data extraction, analysis and presentation work is less intense, needs may arise for special projects related to streamlining the firm's overall use of data to help ensure the highest quality of service to ClearView Members.

While the Research Associate role may evolve over time, initial activities will include the following:

- Extraction of data from various sources to support ClearView activities, including meetings and presentations for members of the ClearView Fiduciary Alliance.
- Creation of presentations in Excel, PowerPoint and possibly other applications to provide very high quality visual and analytic support for meetings with Members.

- Drawing on various sources, assemble data and prepare marketing presentations for potential new ClearView Members.
- Assist with extraction and analysis of quarterly investment performance data; develop tools to help automate and streamline this process.
- Ad hoc analyses and presentation support as needed.

Position Requirements

The position requires several key characteristics:

- Financial acumen – While a degree in finance or accounting is not mandatory, intermediate to advanced coursework in one or both of these areas would be very helpful. Knowledge of investments would also be a plus.
- Understanding of and ability to apply basic statistical analytical tools.
- At least three years of relevant work experience.
- Good understanding of automated systems and ability to learn new systems quickly.
- Outstanding Excel and PowerPoint skills/experience including, at a minimum:

    Excel
    - ✓ Importing and exporting key data
    - ✓ Using shortcuts and formulas
    - ✓ Building charts and graphs
    - ✓ Sorting and filtering data
    - ✓ Utilizing pivot tables and macros

    PowerPoint
    - ✓ Creating and formatting templates
    - ✓ Creating presentations
    - ✓ Creating interactive slideshows
    - ✓ Inserting, embedding, and linking media and data

Other Desired Characteristics

The successful candidate will be a self-starter with a strong capability to work independently. Key characteristics include:

- Timeliness, integrity and reliability.
- Attention to detail and ability to proof own work.
- Strong communication skills – verbal and written.
- Ability to work reliably with minimal supervision.

To Apply

Candidates may submit a resume and cover letter to JMcGlothlin@ClearViewFiduciary.com.   The deadline for applications is January 31, 2022. Thank you for your interest in the ClearView Fiduciary Alliance.