



## 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](http://www.whittiertrust.com).

### **POSITION SUMMARY**

The primary responsibility of the Investment Assistant intern is the support for 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 to communicate with clients. The internship is expected to last 10-12 weeks with start and end dates flexible, based on candidate's semester start and end dates. Advanced Excel skills will be needed. Pursuing a Bachelor's Degree is expected.

### **Essential Duties and Responsibilities**

- 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
- Performing custom return calculations including interim period and after tax analysis as directed
- Understanding of risk analysis
- Maintaining and tracking composite performance
- Create and generate custom reports for Portfolio Managers to monitor accounts (Bloomberg, internal accounting programs, FactSet, Excel) as directed
- Binding presentation books for existing clients and prospects
- Provide research using Bloomberg, FactSet, and other data providers to create reports and graphs for client presentations as directed
- Assist with collecting, synthesizing and organizing equity, fixed income and economic research data
- Ad hoc tasks for Portfolio Managers as directed

Resumes and corresponding documentation may be submitted confidentially to [hrdept@whittiertrust.com](mailto:hrdept@whittiertrust.com).