



## 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 Analyst intern is the support for the Portfolio Manager(s) and current Investment Analysts. The Analyst intern will be expected to perform in depth financial analysis for current Analysts and Portfolio Managers. This will take the form of a summer long research project interspersed with ad hoc and as needed analysis. The primary deliverable at conclusion of the internship will be an in-depth report about current investment opportunities in either a sector or asset class. Whittier Trust is a multi-asset investment manager and as such the intern will be educated on and assist with the understanding of multiple asset classes and alternative investment strategies. Interns at Whittier Trust will participate in weekly investment committee meetings and due diligence of outside alternative assets managers.

Additionally, the analyst will be expected to provide relevant analysis and risk metrics to the Portfolio Managers to enhance the ability of the Portfolio Manager to implement views in client portfolios. Additional responsibilities will also include the preparation of exhibits/reports to communicate with clients.

### **ESSENTIAL DUTIES AND RESPONSIBILITIES** *include the following. Other duties may be assigned:*

- Detailed stock analysis and research
- Monitoring client portfolio asset allocation and liquidity
- Analyzing portfolios to ensure they reflect Whittier Trust sector and security outlook
- Implementing portfolio changes across accounts
- Ensuring trades are made in accordance with client investment policy statements
- Understanding of risk analysis
- Create and generate custom reports for Portfolio Managers to monitor accounts (Bloomberg, internal accounting programs, FactSet, Excel)
- Research using Bloomberg, FactSet, and other data providers to create reports and graphs for client presentations
- Collecting, synthesizing and organizing equity, fixed income and economic research data
- Binding presentation books for existing clients and prospects

**QUALIFICATIONS** *Advanced Excel skills and strong grasp of financial statements will be beneficial. Pursuing a Bachelor's Degree is expected.*

- Ideal candidate will be pursuing a BA in his or her 3<sup>rd</sup> or 4<sup>th</sup> year of school
- Ability to communicate (orally or in writing) with clients and articulate portfolio holdings, asset allocation and strategy regarding their account
- Strong Excel skills with ability to build analytical models and custom reports
- Familiarity with Bloomberg, FactSet and Axys and a plus

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