



Investment Officer

Overview:

The State of Connecticut Office of the State Treasurer is accepting applications for the position of Investment Officer – Public Equities with a primary focus on global equity investments.

Under the leadership of Connecticut's State Treasurer, Erick Russell, the Office of the Treasurer is dedicated to safeguarding the State's financial resources and taxpayers' dollars while maximizing returns, minimizing risks, and operating at the highest professional and ethical standards. Through investments and disbursements, the Office of the Treasurer continues to enhance the State's fiscal stability, financial literacy, college savings, and its approach to leveraging business partnerships and corporate governance policies to address social issues that impact shareholder value.

The Pension Funds Management Division (PFM) assists the State Treasurer, as principal fiduciary, in executing the investment programs of the Connecticut Retirement Plans and Trust Funds (CRPTF), which consists of six State Pension Funds and twelve State Trust Funds. We are recruiting an Investment Officer to assist the PFM in managing the investment and operational objectives of the public equities asset class.

This is a full-time (40 hours per week, Monday - Friday), unclassified position and is appointed in accordance with Section 3-13a of the Connecticut General Statutes. The Investment Officer – Public Equities will work at our location in Hartford, CT.

THE ROLE:

Under the direction of the Principal Investment Officer – Public Equities and their team, the Investment Officer assists in the management of global equity investments in adherence with all aspects of the Investment Policy Statement. The position will be primarily focused on the CRPTF's global equity investments managed by external investment managers.

ABOUT THE PENSION FUNDS MANAGEMENT DIVISION

The Pension Funds Management Division executes the investment programs of the Connecticut Retirement Plans and Trust Funds, which consists of six State Pension Funds and twelve State Trust Funds. As the principal fiduciary of the CRPTF, State Treasurer Erick Russell is responsible for managing the invested assets for over 200,000 state and municipal employees, teachers, retirees, and survivorships who are pension plan participants and beneficiaries as well as for trust funds that support academic programs, grants, and initiatives throughout the State.



NATURE OF WORK

With direction from the Principal Investment Officer – Public Equities and their team, this position will assist with the investment research and portfolio management of the Public Equity asset classes of the CRPTF.

EXAMPLES OF DUTIES

- Supports the oversight and management of investments in the CRPTF's global equity portfolio.
- Screens, evaluates, selects, and monitors external investment managers.
- Supports Principal Investment Officer and leadership with diligence on potential investments.
- Conducts analysis of external investment managers.
- Performs investment-related tasks necessary for the administration and operations within the Pension Fund Management Division.
- Supports investment officers and leadership with monitoring and oversight of investment fund managers, consultants, and custodians.
- Supports the preparation of internal memorandums and presentations.
- Assists with contracting for investment and service contracts.
- Conducts periodic reviews of ongoing investment programs.
- Reports and reconciles various operations, accounting, and performance data.
- Creates, monitors, analyzes, and interprets reports.
- Assists in the decision-making process on priorities of investment options.
- Supports investment officers and leadership in managing risk exposure.
- Analyzes and develops asset allocation plans.
- Monitors asset performance and conducts modeling and attribution analysis.
- Performs related duties as required.

Knowledge, Skills, and Abilities

Strong candidates for the Investment Officer-Public Equities position will possess the following:

- Demonstrable knowledge of:
 - Investment practices and procedures.
 - Investment terminology.
 - Analysis of Global Equities investments
- Demonstrable interpersonal and communication skills, including the ability to interact with colleagues, investment managers, and other internal and external constituents.
- Demonstrable experience with Excel and other Microsoft Office programs.
- Analytical skills, including fundamental analysis of public equities and the preparation of financial and analytical reports.
- The ability to work independently and appropriately prioritize multiple tasks.



- Strong attention to detail, including the ability to analyze the risk and performance of external investment managers.
- Understanding of legal documentation/contracts/amendments related to investments.

MINIMUM QUALIFICATIONS

- Nine (9) years of experience working in an investment management, pension, endowment or equivalent environment performing public equity investment related functions.
- College training in a major/minor closely related to the finance, accounting, real estate, economics or other related field of study, may be substituted for the General Experience on the basis of fifteen (15) semester hours equaling one-half (1/2) year of experience to a maximum of four (4) years for a Bachelor's degree. Graduate degree or CFA preferred.

To Apply

- Interested and qualified candidates are invited to submit a resume and cover letter to Yvonne Welsh (Yvonne.Welsh@ct.gov) with a subject line referencing "Investment Officer- Public Equities."
- Applicants invited to interview may be required to submit additional documentation, which supports their qualification(s) for this position. At the discretion of the Office of the State Treasurer, these documents may include writing samples, professional references, college transcripts, verification of certification or licensure, etc.

NOTE: Selection for employment is contingent upon the satisfactory completion of reference checks.

This position is an appointed position that serves at the pleasure of the Treasurer. This position is in the unclassified service and is not covered by the terms of a collective bargaining agreement.

AN AFFIRMATIVE ACTION/EQUAL OPPORTUNITY EMPLOYER

The State of Connecticut is an equal opportunity/affirmative action employer and strongly encourages the applications of women, minorities, and persons with disabilities.