# Investment Analyst

## David and Lucile Packard Foundation | Los Altos, California

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## Background

The David and Lucile Packard Foundation is a family foundation located in Los Altos, California. The Foundation is guided by the enduring business philosophy and personal values of Lucile and David Packard, who helped found one of the world’s leading technology companies. Their approach to business and community participation has guided our philanthropy for 50 years. Today, their children and grandchildren continue to help guide the work of the Foundation. The Foundation makes grants at the local, state, national, and international level.

We work on the issues our founders cared about most, which are: improving the lives of children; enabling the creative pursuit of science; advancing reproductive health; conserving and restoring the earth’s natural systems; and supporting and strengthening an array of local nonprofit organizations.

The Foundation expects to make grantmaking awards of up to $300 million in 2014. A staff of 110 conducts the day-to-day operations of the Foundation and a Board of Trustees oversees the work of the Foundation. David and Lucile Packard passed on to the Foundation the following core set of values: integrity; respect for all people; belief in individual leadership; commitment to effectiveness; and the capacity to think big. More information about the Foundation can be found at[www.packard.org](http://www.packard.org/).

## Job Summary

We are seeking an Analyst to join a nine-person Investments team, which invests and manages the Foundation’s portfolio of approximately $6.5B. Proceeds from the team’s investments go to fund the Foundation’s grants. The Analyst position is an entry-level, apprenticeship role that will allow one to gain a complete view of the investment process across multiple asset classes. This position is a key member of the Investments team, involved in all aspects of portfolio management, including the selection and monitoring of investment managers for the portfolio, performing investment research, and conducting portfolio and performance analysis. It is a great opportunity to gain exposure to investing across a variety of asset classes, such as public equity, venture capital, leveraged buyouts, fixed income, hedge funds, real estate, and natural resources, and to learn Endowment and Foundation investment management from the ground up. The Analyst will have opportunities to interact directly with top fund managers from every asset class and a variety of geographies. The successful candidate will be able to work confidently in a small and flat team environment. Investment experience is not required, but strong quantitative skills and an

## Responsibilities

* Support the Investment team in all aspects of the investment diligence process, including participating in meetings with existing and prospective managers; assisting in the quantitative and qualitative evaluation of investment opportunities; and assisting in the preparation of investment recommendations to the Investment Committee
* Analyze and synthesize data relating to the investment performance and exposures of individual managers, asset classes, and the overall portfolio and articulate key findings and trends
* Track and maintain investment-related information on central spreadsheets and databases; identify and research anomalies
* Prepare materials for quarterly Investment Committee meetings in Excel, Word, and PowerPoint
* Complete special research projects as required
* Work towards earning the Chartered Financial Analyst (CFA) designation

## Qualifications

**Knowledge, Skills, and Abilities**

* High level of interest in investment management
* Strong orientation to detail and accuracy and excellent organizational skills
* Strong and demonstrated quantitative and analytical skills
* Strong writing and communication skills
* Proficiency with Microsoft Excel
* Intellectual curiosity and ability to think critically; must be proactive and open to new challenges
* Ability to work well under pressure and within a small team
* Able to travel as needed

## Compensation

We offer an excellent benefits package and a salary that is commensurate with education and relevant work experience. The position is full-time, exempt, and located in Los Altos, CA.

## Requirements/Other

**Physical Requirements**

Candidate must have the ability to communicate via voice telephone, read and understand written communication, and generate written communication manually and using a computer. Candidate must also be able to work at a desk for long periods of time (2-3 hours), lift and move documents and supplies (not to exceed 25 lbs.), and bend to file or retrieve documents.

**Education and Experience**

Bachelor’s degree from a four-year college with excellent academic performance

## How to Apply

Please email a one-page cover letter explaining your interest, one-page resume, and college transcript to [jobs@packard.org](mailto:jobs@packard.org)with the subject line 14-09-8890R. If your Math and Verbal SAT I scores are not included on your resume, please include them in your cover letter (please submit ACT scores if you did not take the SAT and all SAT II scores, if available).