



## Senior Investment Analyst, Risk Management & Asset Allocation

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### About Margaret A. Cargill Philanthropies

Margaret A. Cargill Philanthropies (MACP) is the umbrella over the grantmaking foundations created by the late Margaret Cargill: Margaret A. Cargill Foundation and Anne Ray Foundation. MACP provides meaningful support through long-term relationships with strategic grantee partners across seven program domains: Environment, Disaster Relief & Recovery, Arts & Cultures, Teachers, Animal Welfare, Quality of Life, and Legacy & Opportunity. The collective assets of MACP place it among the 10 largest philanthropies in the United States.

The two foundations have separate boards and investment portfolios but share a common mission of providing meaningful assistance and support to society, the arts, and the environment.

- **Margaret A. Cargill Foundation** is a private foundation that came into existence upon Ms. Cargill's death in August 2006. At year-end 2021, MACF's assets are approximately \$3.7 billion.
- **Anne Ray Foundation** is a supporting organization, which may make grants only to beneficiary organizations specifically named by Ms. Cargill. At year-end 2021, ARF's assets are approximately \$5.3 billion.

MACP's [Philosophy of Grantmaking](#) underscores the values and guiding principles of Margaret A. Cargill by: using education and innovation as a means to achieve core purposes; empowering people to be self-sufficient; maintaining a low profile while meeting the needs of others; supporting programs that could have a broad impact, having socially redeeming values and standards, and that value life; and relieving suffering in times of disaster. As a core element of its philosophy, MACP invests in long-term relationships with key grantee organizations in order to find solutions that are consistent with the values of both parties.

In 2018, MACP began engaging in an in-depth learning and visioning process around diversity, equity, inclusion, and justice (DEIJ). We seek to foster a culture—both internally and externally with grantees, community members, and other strategic partners—where differences are seen and respected, voices are heard, and all individuals feel supported and valued for their authentic selves

Additionally, MACP is engaging in a **diversity, equity, inclusion, and justice process** that includes:

- Building intercultural competency and emotional intelligence work at an organizational level, to include deeper learning, dialogue, and action on racial and social equity.
- Increasing local racial equity and justice in grantmaking to fund local efforts to address systemic racism and social inequities; and
- Reviewing each programmatic domain to more formally examine the role justice, equity and



inclusion currently play and can play in MACP's grantmaking.

- You can read more about our commitment [here](#).

### **About Our Workplace**

Our community of more than 100 employees brings expertise from a variety of professional and personal experiences. We are inspired by a common mission, shared values, and the difference we can make by working together.

We are proud to offer a welcoming workplace that supports our employees' careers, health, and overall wellbeing. We supplement that environment with activities throughout the year that promote collaboration, learning, and fun. Reflecting our investment in staff wellbeing, we have deepened our commitment to flexible work schedules and have implemented an innovative new approach to work arrangements in 2022. All MACP staff have a reduced workweek, with half-day Fridays, year-round, with the option of working remotely up to two days per week.

MACP's home in Eden Prairie, Minnesota is a foundational aspect of our identity, reflecting an organizational commitment to sustainability, balance, and collaboration. In spring 2016, MACP completed a major building expansion, and our LEED Platinum certified building features include sustainable materials, outdoor meeting areas, a fitness room, and unique art and keepsakes from Ms. Cargill's personal collection and others, that reflect our grantmaking and the communities where we work. Our space is a living reminder of our values.

Eden Prairie is part of the Twin Cities metro area including Minneapolis and St. Paul, which have over 3 million residents and together make up one of the metropolitan areas in the country. A unique blend of small town and major cosmopolitan hub, both urban cores boast a thriving business atmosphere.

For more information about MACP, please visit our website: [www.macphilanthropies.org](http://www.macphilanthropies.org).

### **The Opportunity**

MACP is seeking candidates who share the organization's values and commitment to join our team as a Senior Investment Analyst, Risk Management & Asset Allocation. The Senior Investment Analyst, Risk Management & Asset Allocation will be responsible for assisting the investment team in managing the investment risk and asset allocation for the Margaret A. Cargill Philanthropies. The Senior Investment Analyst provides strong analytical support, knowledge of fundamental and quantitative research techniques, and strategic insights to conduct research, assess risks, assist in the management of strategies, and report results.

The Senior Investment Analyst will report to and assist the Director of Risk Management and Asset Allocation in all aspects of investment risk management and asset allocation and will be a part of the Investments team.



- Responsibilities
  - Assist with day-to-day activities including decomposing investment portfolios and returns, conducting fundamental and quantitative research, and managing portfolio analytics.
  - Support the management of a risk premia portfolio including monitoring daily portfolio activity, research, and portfolio rebalancing.
  - Assist with managing the derivative overlay programs by monitoring exposures and cash flows and conducting research.
  - Contribute to the asset allocation research by applying rigorous fundamental and quantitative research techniques to assess economic outcomes, capital market expectations, and alternative approaches to asset allocation.
  - Review, analyze and reconcile performance and risk attribution reports prepared by third parties.
  - Identify and compile data as needed for manager and market analysis.
  - Assist with manager risk due diligence and manager monitoring activities, including review of underlying portfolio investments, decomposing returns, analyzing portfolio fit, and documenting monitoring activities.
  
- Qualifications
  - Bachelor's degree in finance, economics, statistics, applied math, or related field required. Master's degree in economics, statistics, applied math, or financial engineering preferred. Progress towards CFA designation preferred.
  - For candidates with a bachelor's degree in finance, economics, or closely related field only, 5+ years of related work experience; including investment research and/or portfolio management.
  - The education and experience requirements will also be satisfied by candidates possessing a master's degree in finance, economics, financial engineering or a closely related field who have relevant work experience including investment research and/or portfolio management.
  - Strong grasp of financial concepts, terms, and benchmarks including knowledge of asset allocation theory and modeling, benchmark analysis and performance measurement.
  - Ability to work independently to solve problems; proven analytical skills.
  - Strong technical knowledge including familiarity with a programming language (R, Matlab, Python) and an ability to learn new technologies.
  - Clear communication skills, collaborative approach and strong interpersonal skills are a must.
  - Superior skill in using tools such as Microsoft PowerPoint and Microsoft Excel.
  - Ability to work hands-on, delving into projects with a strong attention to detail and emphasis on producing a high-quality work product.
  - Proven ability to maintain the highest level of integrity and confidentiality in both



internal and external relationships.

- Travel expectations
  - Up to 20% estimated

### **Compensation and Benefits**

MACP has identified a salary range of \$136,000 - \$160,000 for this role. In addition, the candidate is eligible for an Investment Incentive Plan. Actual starting salary of candidate will be commensurate with years, breadth, and depth of relevant experience, education, certifications, credentials, special skills, accomplishments, and other factors relevant to the position.

Additionally, MACP provides a generous benefit package, including:

- Competitive compensation
- Strong medical, dental, and vision benefits for staff and their dependents with competitive monthly premiums and flexible spending accounts
- Reduced work week for all staff, with half-day closures on Fridays, year-round
- Minimum of 20 days of paid time off, in addition to a week-long year-end office closure
- Retirement programs, including 401(k) matching at 5%, with access to employer-paid financial planning resources
- In addition, the Organization may provide a discretionary contribution to employees' 401(k) plan that vests over a five year period.
- Matching gift program for charitable donations
- Additional benefits such as an employee assistance plan, an onsite fitness room, paid parental leave, and tuition reimbursement

### **Commitment to Diversity, Equity, Inclusion, Equal Opportunity, and Accessibility**

We know that engaging, building trust, and making a difference relies on the collective wisdom and strength of a truly diverse organization. With this in mind, and as an equal opportunity employer, we encourage and strongly welcome candidates of all identities, lived experiences, orientations, and communities to apply.

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**To Apply:** Qualified candidates should apply by emailing Aaron Clubb at True Search.

**Aaron M. Clubb**

Partner

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