

## Investment Manager

### appointment outline

- Responsible to:** Chief Executive Officer
- Location:** Canberra or Sydney
- Employment basis:** Permanent full time
- Organisational environment:** Leading the team responsible for providing strategic investment management; developing, implementing and maintaining a sound investment strategy for the unit trust portfolios; their performance; and associated reporting requirements.

### key responsibilities

- Primarily manage the unit trust portfolios within individual security and asset class limits.
- Develop and implement a strategic investment plan and related strategies for the portfolios.
- Develop and maintain strong relationships within the finance industry and associated regulatory environment.
- Provide leadership and direction to the investment team and contribute to the overall strategic direction of the organisation.
- Research and evaluate internally generated research on existing and potential investments ensuring close alignment of investment decisions with the Australian Ethical Charter.
- Setting or amending approved limits for Australian and international stocks and other securities, in consultation with relevant analysts.
- Re-weighting of portfolios on a daily basis or as required based on approved cash holding levels, market price movements, relative value of approved equities and other approved limits.
- Oversight securities transactions including, listed equity purchases/sales, and set buy/sell price limits.
- Oversight reporting requirements for internal Investment Committee, Compliance Committee and Board.
- Develop investment methodology, systems and controls.
- Provide input to and approvals for public information disclosure for the trusts.
- Understand the legal environment and resulting risk parameters applicable to the area of responsibility.

### qualifications and experience

- Tertiary qualifications in economics or related field and extensive relevant experience in portfolio investment and analysis, including listed equity and stock selection, and sound knowledge of applied portfolio theory and analysis.
- Qualifications and experience necessary to allow appointment as a Responsible Manager.

### skills and knowledge

- Strong knowledge and understanding of the Australian financial system.
- Ability to appraise the merits or otherwise of potential investments.
- Ability to present a case verbally and in written form, and disseminate information accurately and concisely.
- Proven ability to communicate complex ideas and investment strategies to a specialist audience when required.
- Capacity to command the intellectual respect of asset consultants and research houses.
- Ability to work collaboratively at senior levels.
- Strong analytical skills and the ability to provide written analysis.

### personal attributes required

- Self-motivated, able to work independently, and use judgement in complex situations.
- Ability to work in a management team, demonstrate appropriate and professional workplace behaviours, and assist and support team members.
- Responsibility, accuracy and integrity.
- Interest in, understanding of and commitment to environmental and ethical issues.

To discuss the appointment,  
phone **Anne O'Donnell** – CEO on 02 6201 1943

Email or post applications and resumes to:  
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