

RVKuhns

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R.V. Kuhns & Associates, Inc. (RVK) is an independent investment consulting firm that has been providing investment advisory services to institutional clients since 1985. The firm consults to over 250 clients located throughout the United States, including corporate retirement plans, public retirement systems, Taft-Hartley funds, endowments and foundations, non-pension operating funds, and high-net-worth individuals and families. To learn more about our company, please visit us at www.rvkuhns.com.

RVK is seeking a talented and knowledgeable professional to serve in the capacity of **Associate Consultant (AC)** in our Portland, Oregon office. As an AC, you will work closely with our consulting team in providing research, portfolio analysis, and investment advice to our clients.

This position requires a unique combination of good business sense and proven qualitative and quantitative abilities. Associate Consultant responsibilities include the daily administration and management of a number of client relationships. There is an expectation that you will be actively involved in all aspects of client service and help manage client deliverables. The duties are multi-faceted and require the ability to communicate effectively, internally and externally. ACs must successfully manage time, identify tasks, determine priorities, and complete deliverables to company standards and deadlines.

Responsibilities include but are not limited to:

- Complete a variety of special projects at the request of the client and/or Consultant. Typical projects include: asset allocation studies, domestic/international equity and fixed income manager style analyses, investment policy revisions, portfolio rebalancing, special research projects, etc.
- Provide day-to-day client service in support of the Consultant.
- Execute client deliverables with required levels of quality and accuracy.
- Perform research on investment management firms and meet with investment managers.
- Write, edit, and proofread client communications and training materials for clients with regard to various investment topics.
- Define key messages and use creativity in presenting ideas, recommendations and information to clients.
- Participate in internal research projects and special client assignments as needed.
- Assist co-workers or other staff with questions or concerns.
- Provide training on elements of investment process and procedures, as needed.
- Attend meetings and present special projects and/or performance reports to clients.
- Prepare ad-hoc market environment and investment research.

AC candidates should have a proven track record of success with a minimum of three (3) years of industry experience in investment consulting, management consulting, internal corporate consulting, banking, private equity, or working with a Plan Sponsor directing, implementing and

coordinating investment strategy. Candidate must possess a Bachelor's degree. A Chartered Financial Analyst® (CFA®) designation and/or a Master's degree in Business Administration, Finance or Economics is preferred. A professional appearance and demeanor with demonstrated abilities to interface with all levels of staff and clients is a must.

The following criteria will be considered:

- Genuine desire to work hard and progress in the investment consulting profession.
- Demonstrated knowledge of investment consulting principles, investment strategies, policies and regulations applicable to the investment consulting industry.
- Proven project management and organizational skills – able to handle multiple priorities, and work well under pressure.
- Well versed in quantitative analytical techniques – able to build quantitative models and interpret results.
- Excellent written and verbal communication skills with careful attention to detail.
- Strong presentation and meeting facilitation skills – comfortable presenting in front of Board of Trustees and Investment Committees.
- Proven self-starter – able to work, think, independently.
- Adaptability to change while striving to improve processes and efficiencies.
- Flexible and open to new ideas within an ever-changing, dynamic environment.
- Knowledge of software and business applications – proficiency with Microsoft applications (Word, Excel, Outlook, Power Point),
- Knowledge of MPI Stylus, Bloomberg, Morningstar, and eVestment Alliance is a plus.
- Strong work ethic – able to work Monday – Friday with client deadlines that may require up to 50-60 hours/week, (including when necessary some evening and weekend time).
- Able to travel as needed across the U.S.A.

RVK offers a competitive benefits package including firm funded medical, dental, and vision plans as well as a 401(k) Retirement Plan, 125 cafeteria plan, 132 transportation plan, tuition reimbursement to enhance professional development, and a Paid-Time-Off Program.

Interested candidates must submit their cover letter with salary requirements, résumé and completed employment application through the company web site at **www.rvkuhns.com**. Only those candidates whose qualifications meet our requirements will be contacted.

No phone calls, faxes, or temporary agencies please.

RVK supports workforce diversity and is an Equal Employment Opportunity Employer.