

MANNING & NAPIER ADVISORS, INC.
JOB DESCRIPTION

INVESTMENT CONSULTANT

Manning & Napier Advisors, Inc. is a Rochester, NY based asset management firm with over 35 years experience and approximately \$16 billion in assets under management.

Overview:

The Investment Consultant position will be broadly responsible for supporting and delivering the consulting-based products and services of Manning & Napier Advisors' Risk Management Group (RMG) and will report to the Director of Manager Analytics. Required skills include an ability to provide analytical insight and strong written and oral communication skills. Areas covered by the Investment Consultant include manager analytics and investment manager/mutual fund analysis, institutional client support, portfolio analysis, performance evaluation, research & development, contributing to position papers, and developing content for newsletters, etc.

Summary of Key Responsibilities:

- **Manager Analytics:**
Serve as the primary analyst for the small/mid cap stock asset class. Duties include developing/maintaining universe of mutual fund recommendations, quarterly updates/confirmation of recommendations, and developing a strong knowledge of equity markets in general.
- **Institutional Client Consulting Reports:**
Serve as a secondary Risk Management contact for Manning & Napier's institutional clients and prospects. Primary responsibilities include preparing institutional consulting reports such as statements of investment policy, asset allocation studies, and manager/mutual fund monitoring with the Risk Management Group. This includes working with client consultants/associates to define a project, assist in gathering pertinent information, and prepare the appropriate analysis (with the help of other RMG members as needed).
- **Research & Development:**
Assist senior RMG analysts in researching new investment/client related topics and issues. Contributions will include developing analytical models, gathering and assimilating data on industry trends, and building illustrations to highlight key conclusions. It is expected that the analyst will contribute to new position papers quarterly, research topics, newsletter articles, new client level analytical reports, and work towards attaining the Chartered Financial Analyst® designation.

- **Other Manager Analytics Support:**

Work with RMG analysts in support of Manager Analytics tasks, including data gathering for periodic monitoring, new recommendations, investigating manager issues and debating solutions. In addition, provide double-check and back-up support for Manager Analytics

- **Delivery of Consulting Reports:**

Develop an in-depth understanding of the Risk Management Group's and Manning & Napier's philosophies, disciplines and methodologies so as to eventually serve as a field contact for the delivery of various investment consulting reports.

- **Other RMG Projects**

Assist senior RMG analysts in preparing RMG reports as needed.

Qualifications:

- 4 year college degree with a strong record of academic achievement.
- Progress towards CFA designation preferred.
- 1 -2 years experience working within the financial services industry.
- Strong analytical skills.
- Excellent written and verbal communication skills.

For consideration, email resume to Greg Howe, Senior Recruiter (ghowe@manning-napier.com). Manning & Napier Advisors, Inc., 290 Woodcliff Drive, Fairport, NY 14450. (www-manning-napier.com)