



M.J. Murdock  
CHARITABLE TRUST

## INVESTMENT OFFICER

### Position Profile

# The Murdock Trust Investment Team provides the financial resources to support and grow our mission.

## OVERVIEW

The M. J. Murdock Charitable Trust seeks to enrich the quality of life in the Pacific Northwest by helping strengthen the region's educational, spiritual, and cultural base in innovative and sustainable ways. Since 1975, the Murdock Trust has helped live this mission by awarding more than \$1.2 billion in grants to nonprofit organizations that share our commitment to the common good.



*Lutherhaven Ministries*

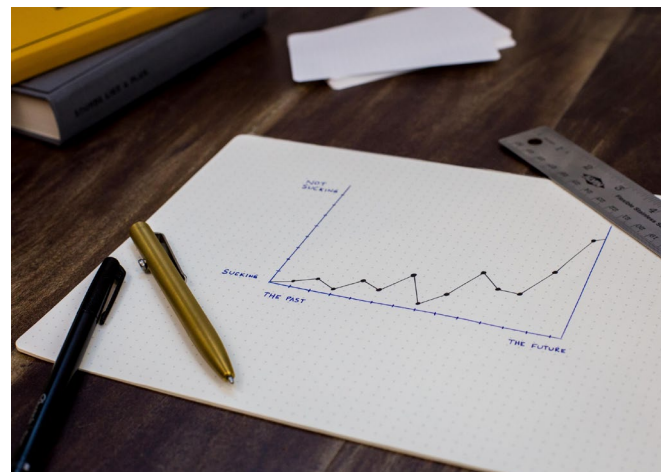


## POSITION SUMMARY

The Investment Officer works alongside the Chief Investment Officer (“CIO”) using a team approach to manage the investment portfolio of the Murdock Trust (“Trust”). The Position assists the CIO in providing all major investment recommendations to the Trustees, considering the Trust’s target return objectives, investment constraints, and capital market assumptions. This includes recommendations around investment selections (e.g., investment managers, funds), liquidity management, and periodic recommendations around investment policy and asset allocation.

## CORE COMPETENCIES

- Brings a breadth of strong investment, finance, and capital market experience.
- Demonstrates flexibility and strong ability to work on a team.
- Demonstrates strong executive presence / professionalism and leadership.
- Ability to identify/develop excellent relationships with future “best-in-breed” managers.
- Shares the Trust’s missional values and a desire to work in a non-profit environment.



*Unsplash: Isaac Smith*

## TYPICAL RESPONSIBILITIES

- Assist in maintaining the Trust's excellent relationships with current investment managers; identifies and develops excellent relationships with future "best-in-breed" managers; is an ambassador of the Murdock mission with all investment managers.
- Assist in periodical review of investment policy, asset allocation, and target returns considering anticipated investment climates.
- Assist in selecting appropriate investments/investment managers for the portfolio to satisfy the Trust's long term Investment Policy objectives.
- Continuously monitor current portfolio and investment managers – teams, strategies, and underlying investments – to understand risks and ensure managers adhere to mandates and expectations.
- Participates on fund managers' advisory boards/limited partner advisory committees as necessary and/or requested and is a value-add partner and participant in these dialogues.
- Assist in conducting quantitative and qualitative due diligence on new investment managers that could add value to the portfolio.
- Assist or independently prepare written investment recommendations for the Trustees.
- Stays informed of market/economic landscape for investment decision-making purposes and formulating capital market assumptions (i.e., expected returns for asset classes/strategies).
- Continuously networks with managers and other investors to learn, share ideas, and source leading standards/practices.
- Assist in developing new analyses and models (e.g., investment reports, cash flow models, performance reports) which may lead to better investment decision-making.
- Together with CIO, recommend and adopt efficient processes to maintain a robust investment program while keeping administrative costs at a competitive level with similar organizations.
- Extensive travel to managers' annual meetings and other conferences (1/3 or 1/4 of job).
- Reviews investment legal documents (i.e. subscription documents, limited partnership agreements, private placement memorandums, side letters, etc.) as necessary to ensure maximum benefit to the Trust (leverage outside legal counsel when needed).
- Periodically reviews Trust 401k Plan to ensure the Plan maintains a diverse lineup of high-quality investment options for participants to choose from.



*Whatcom Land Trust*





*University of Portland*



*Bravo Youth Orchestras*

## EXPERIENCE AND EDUCATIONAL REQUIREMENTS

- 10+ years' experience in institutional investment management; must have experience with, and be able to evaluate, all asset classes/strategies (especially private market).
- Bachelor's degree required; MBA, CFA, CAIA, or other higher designation preferred.
- Extensive network among investment managers and institutional investors.
- Must be adaptable, self-starter, able to work independently but participate as a team player, organized, detail oriented, and professional.
- Excellent written communication, oral communication, and presentation skills.
- Familiarity and comfort in being in a work environment where faith-based organizations and individuals are present and part of the day-to-day programming and operations.
- Continuous learner with a desire to grow professionally.
- Location: Vancouver, Washington

## QUALIFIED CANDIDATES

Please submit a resume and a cover letter to [Resumes@murdocktrust.org](mailto:Resumes@murdocktrust.org) discussing how your experience and background would be best suited for this role and why you are interested in working for the Murdock Trust. Joining the Murdock Trust team is more than just a place to work. It is a relational and intentional community with a humble commitment to understanding and serving the diverse Pacific Northwest communities. Based on the values of Jack Murdock, the Murdock Trust stewards staff with exceptional care, benefits, and culture.

The Murdock Trust also offers an exceptional benefit package including:

- Medical, Dental and Vision Insurance
- Section 125 accounts including flexible spending and dependent care
- Immediate eligibility and vesting 401(k) and employer contribution and match
- Disability and Life insurance
- 11 paid holidays, vacation, and sick time