CTC | Consulting

Performance Reporting Analyst

Description

CTC Consulting LLC (CTC) is seeking a performance reporting analyst for its Portland office. This position reports to a performance reporting team lead, and will work closely with other reporting analysts, members of the consulting and research departments, and client service teams. This position includes processing, monitoring and providing performance reporting on traditional and alternative (e.g. hedge fund and private equity) investment managers.

The performance reporting analyst will be responsible for the following:

- Calculating assigned monthly and quarterly performance reports.
- Preparing quarterly performance books for clients.
- Researching and reconciling returns between client portfolios and investment managers.
- Assisting client service team in client specific projects.
- Taking initiative to identify client issues proactively and taking the required steps to alert the client service team.
- Taking initiative for identifying and implementing PRG process improvements.

Qualifications

The successful candidate must have excellent written and verbal communication skills, be proactive with a high energy level, and have poise and professionalism when interacting with internal and external contacts. The candidate must have strong analytical, accounting and statistical skills. The candidate must have the flexibility and creativity to respond productively to individualized needs of team leads, consultants and clients and react to time pressure and difficult situations appropriately. Immaculate attention to detail and thoroughness required, as are strong computer skills including advanced knowledge of Microsoft Excel.

Education/Experience: Undergraduate degree with a minimum of 2-5 years relevant work experience. Accounting, investment or financial back office experience or background preferred. Prior experience in high net worth, family office or institutional investment clients preferred.

About CTC

Founded in 1981, CTC is an independent investment consulting firm providing investment advice to ultra high net worth families, family offices, trusts, and foundations as well as portfolio management services to insurance dedicated funds. CTC is headquartered in Portland, Oregon with additional offices in the east coast. For additional information regarding CTC, please visit www.ctcconsulting.com.

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