



Chief Investment Officer

Salary Group: B33

Class Code: 1165

<u>CLASS TITLE</u>	<u>CLASS CODE</u>	<u>SALARY GROUP</u>	<u>SALARY RANGE</u>
CHIEF INVESTMENT OFFICER	1165	B33	\$135,269 - \$228,775

GENERAL DESCRIPTION

Performs highly advanced and/or managerial (senior-level) work directing a managed investment fund program. Work involves establishing and formulating recommendations on investment policies and overseeing portfolio management, research, trading, investment planning, and strategy; and investment risk management functions. Supervises the work of others. Works under minimal supervision, with extensive latitude for the use of initiative and independent judgment.

EXAMPLES OF WORK PERFORMED

Directs securities investment operations, recommends and implements asset mix changes, and allocates cash flows for an internally managed fund.

Develops and implements internal controls to safeguard the assets of the fund.

Develops long-range investment plans and strategies and oversees investment programs to achieve the approved strategies.

Develops and maintains relationships with securities dealers and conducts analyses on securities investment activities.

Monitors the performance of investment portfolios, monitors and evaluates overall fund performance, and modifies portfolios as appropriate.

Monitors various markets to identify trends and the best opportunities for the fund.

Supervises the work of others.

Performs related work as assigned.

GENERAL QUALIFICATION GUIDELINES

EXPERIENCE AND EDUCATION

Experience in management, analysis, and securities work. Graduation from an accredited four-year college or university with major coursework in finance, business administration, economics, or a related field is generally preferred. Experience and education may be substituted for one another.

KNOWLEDGE, SKILLS, AND ABILITIES

Knowledge of institutional management of large investment funds across various types of asset classes, of trading approaches and techniques, and of factors affecting price trends.

Skill in conducting and interpreting analytical market research, in applying statistical concepts and methods, and in the use of statistical and research applications.

Ability to apply financial research techniques and interpret the results, to conduct comprehensive evaluations, to comply with ethical standards and professional codes of conduct, to communicate effectively, and to supervise the work of others.

REGISTRATION, CERTIFICATION, OR LICENSURE

May require certification as a Chartered Financial Analyst (CFA).