



EFL Associates

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Wilshire

WILSHIRE ADVISORS LLC

**ASSISTANT VICE PRESIDENT OR VICE PRESIDENT
INVESTMENT CONSULTANT**

POSITION SPECIFICATIONS

CLIENT

Our client, **Wilshire Advisors LLC** (“**Wilshire**”) is a trusted investment firm and partner to more than 500 institutional and financial intermediary clients globally, including pension funds, foundations, endowments, fund managers, financial advisors and other large intermediaries. Founded in 1972, the firm has evolved from an investment technology provider into a global advisory company specializing in innovative investment solutions, consulting services, technology solutions and world-leading market indexes such as the FT Wilshire 5000 Index. In early 2021, **Wilshire** was acquired by private equity firms CC Capital Partners and Motive Partners. Mark Makepeace, founder and former CEO of FTSE Russell, replaced Wilshire founder, Dennis Tito, as CEO at that time.

Established in 1981, **Wilshire’s** institutional solutions practice is highly-regarded and respected for providing OCIO and investment consulting services to large institutional clientele. In aggregate, the firm’s institutional clients manage assets in excess of \$1.2 trillion. The firm provides strategic advice on asset allocation, risk management, investment policy development, asset class structuring, investment research and analytics, investment manager evaluation and more.

In addition to the headquarters location in Santa Monica, CA, **Wilshire’s** 275 employees work from 11 global locations in Denver, Chicago, Pittsburgh, Jersey City, London, Amsterdam, France, Canada, Suzhou, Hong Kong and Singapore.

For more information about **Wilshire** please visit the website at www.wilshire.com.

THE OPPORTUNITY

Wilshire is seeking a highly qualified and service minded investment professional to join their team at either the Assistant Vice President or Vice President-level depending on qualifications, to serve in their growing institutional client solutions group. The successful

Consultants in Executive Search

candidate can work from any of **Wilshire**'s domestic offices or even remotely, assuming a willingness to travel as necessary to client locations and the firm's offices. This role will entail working with institutional clients, their boards and/or investment committees and internal investment personnel, on asset allocation and asset/liability studies, investment structure analysis, manager evaluation and selection, summary level performance evaluation, including benchmark analysis and selection and total fund attribution, investment research, and client presentation development and delivery. The position further entails supporting the firm's business development efforts.

Key Responsibilities include:

- (65%) Manage or assist in management of client relationships across all investment related matters, including:
 - Asset Allocation
 - Investment research and education
 - Manager selection and monitoring
 - Investment policy management

- (25%) Support associates in development and understanding of key client initiatives
 - Audit work for client delivery
 - Provide education and mentoring to assist in professional growth

- (10%) Generate or support new business development
 - Participate in RFP responses
 - Present to prospective clients

EDUCATION AND EXPERIENCE

- Bachelor's degree; MBA or MS degree with an emphasis in finance or investments, highly preferred
- Professional certification as a CFA or CAIA is strongly preferred
- Strong investment acumen and progressive experience (ideally at least 6 years) in institutional investment consulting, investment management with a corporate or public plan sponsor, or in buy-side investment management/analysis
- Strong quantitative analysis skills
- Willingness and ability to travel around 50% of the time
- Proficiency in Microsoft Office tools (Word, PowerPoint, Excel)

PERSONAL CHARACTERISTICS

- Excellent communication skills, including written and oral, and the ability to identify, cultivate and maintain relationships
- Outstanding interpersonal skills; ability to relate to individuals with varying degrees of investment knowledge
- Ability to interact credibly (demonstrating "executive presence") with all levels of a prospect organization, from executive management to junior investment staff
- A "team player"; shares best practices and builds strong internal relationships throughout the Wilshire organization

**SPECIFICATIONS – ASSISTANT VICE PRESIDENT OR VICE PRESIDENT –
INVESTMENT CONSULTANT**

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- An entrepreneurial bent and a “roll-up-the-sleeves” orientation while consistently displaying a passion for excellence
- Unquestioned personal ethics and integrity in all dealings
- Strong results orientation and ability to work independently with sufficient attention to detail and follow-up
- Strong multi-tasking skills; ability to switch gears quickly and successfully and juggle multiple priorities
- A quick thinker, good on one’s feet; able to handle unexpected questions with aplomb

COMPENSATION

Wilshire offers a dynamic, entrepreneurial work environment, and a competitive compensation package, including base salary, incentive and benefits. Benefits include generous PTO, 401(k) match, affordable and comprehensive medical/dental/vision insurance, CFA and other professional membership reimbursement, and more.

APPLICATION PROCESS

EFL Associates, an executive search firm, is assisting **Wilshire** with this important search. All calls and inquiries should be made through the search firm representatives listed below. Referrals and applications will be held in confidence. Review of applications will begin immediately and will continue until the position is filled.

NON-DISCRIMINATION

Our client and EFL Associates firmly support the principle and philosophy of equal opportunity for all individuals, regardless of age, race, gender, sexual orientation, creed, national origin, disability, veteran status or any other protected category pursuant to applicable federal, state or local law.

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