



## EFL Associates

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# Wilshire

WILSHIRE ADVISORS LLC

VICE PRESIDENT  
ALTERNATIVES RESEARCH

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## POSITION SPECIFICATIONS

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### CLIENT

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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.

**Wilshire’s** alternatives research group advises on more than \$20 billion of assets across multiple investment types, strategies, and geographies. **Wilshire** has a global perspective on the alternatives market and maintains worldwide research capabilities and a major international client base. The alternatives research team is comprised of, approximately, 45 professionals based in **Wilshire’s** Santa Monica (Western US), Pittsburgh (Eastern US), Amsterdam (Europe), and Hong Kong (Asia/Pacific) offices.

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](http://www.wilshire.com).

### THE OPPORTUNITY

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**Wilshire** is seeking a highly qualified investment professional to join their team as a Vice President, to help lead research and due diligence efforts across all private market segments (private equity, private credit, and real assets) in North America. Familiarity

Consultants in Executive Search

with marketable alternatives (liquid alternatives and hedge funds) is desirable, but not required. The successful candidate will be responsible for developing and maintaining deep relationships with private fund managers across the region, as well as creating access to top-tier managers.

As a key member of both the regional and global deal teams, the Vice President will assist with management of the North American offices of the alternative research team, including helping to hire and develop the Analyst/Associate pool.

Key Responsibilities include:

- Leading due diligence efforts for fund investments and transactions (co-investments and secondary sales);
- Deal development and execution;
- Monitoring existing and new portfolio commitments;
- Attending Annual Meetings, Advisory Board Meetings, and quarterly reviews of underlying portfolio companies; and
- Monitoring Limited Partner Agreement amendments.

The successful candidate may choose to work from either **Wilshire's** Santa Monica, CA or Pittsburgh, PA offices.

## **EDUCATION AND EXPERIENCE**

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- Bachelor's degree; MBA preferred, but not required
- Minimum of 5 years of experience in private equity markets
- Excellent analytical skills (both quantitative and qualitative)
- Experience at a recognized investment bank, management consulting firm, or large pension plan preferred
- Strong business and investment acumen
- Proven deal execution experience
- Strong institutional relationships in North America
- Professional certification as a CFA or CAIA is preferred, but not required

## **PERSONAL CHARACTERISTICS**

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- An independent, hard-working, and results oriented self-starter
- Excellent communication skills, including written and verbal, and the ability to present ideas with precision and conviction
- An entrepreneurial bent and a "roll-up-the-sleeves" orientation
- Organized, thorough, and detail-oriented
- A passion for excellence
- A natural team-oriented individual who can provide leadership and mentorship to the team's investment professionals and staff
- A "team player" who shares best practices and is able to work well with different personality types, both junior and senior, throughout the Wilshire organization
- A high degree of ethics, professionalism, and integrity in all dealings
- Comfortable with travel which, periodically, can be extensive

## **COMPENSATION**

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**Wilshire** offers a dynamic, entrepreneurial work environment, and a competitive compensation package, including base salary, incentive, and benefits. This position will also participate in the carried interest pool. Benefits include 15 days of paid time off, 13 paid holidays 401(k) match, affordable and comprehensive medical/dental/vision insurance, CFA and other professional membership reimbursement, and more.

## **APPLICATION PROCESS**

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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**

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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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