

**WILLIAMS COLLEGE INVESTMENT OFFICE  
DIRECTOR POSITION PROFILE**

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**POSITION:** Director

**REPORTS TO:** Deputy Chief Investment Officer

**LOCATION:** Boston, Massachusetts

**SUPPORT A LEADING ACADEMIC INSTITUTION**

Williams College is a private, residential, liberal arts college, with graduate programs in the history of art and in development economics and is based in Williamstown, MA. The undergraduate enrollment is approximately 2,000 students.

The Williams College Investment Office, based in Boston, manages the \$4.7 billion endowment which plays a major role in supporting over 50% of the operations of the college annually. The Investment Office is staffed by a small and collaborative team of eleven people; as a member of our team, your contribution has a direct impact on the capacity of Williams to provide educational opportunities to students from all backgrounds.

**POSITION SUMMARY**

The Williams College Investment Office seeks an investment professional to report to the Deputy Chief Investment Officer.

This person will support the management of five asset classes: global long/short equity, absolute return, real assets, non-investment grade fixed income, and cash along with other key portfolio wide responsibilities inclusive of asset allocation, diversity, equity, and inclusion work (“DEI”), and sustainability.

This person will play a key role in supporting our student programs, including the oversight, management, and mentorship of our full-time analysts and summer interns, as well as managing the execution of our Winter Study class.

Primary responsibilities will include the following:

- Assist in the sourcing, screening, and ongoing monitoring of prospective investment opportunities; maintain industry network to expand Investment Office knowledge.
- Lead the due diligence processes for new and existing managers, including arranging due diligence meetings, completing attribution analysis and other relevant analytics, conducting reference calls, drafting investment recommendations, and negotiating legal agreements. Present recommendations to the advisory committee and investment committee, as appropriate.
- Assist in the monitoring of the active portfolio including leading manager meetings, developing agendas, and monitoring key risk areas.
- Lead an area of investment and/or an asset class over time including developing and implementing a strategy, building a pipeline, and cultivating a peer network.
- Prepare, or lead the preparation of portfolio and manager analytics, leveraging research tools and available data.

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- Contribute to the annual asset allocation review process as well as other portfolio wide investment projects, including work that supports other asset classes in the portfolio.
- Work with the team in the preparation of materials for the Investment Office's various committees including Advisory and Investment Committees, as well as other materials as needed.

**QUALIFICATIONS**

This investment professional is expected to have most of the following professional experiences and attributes:

***Experience:***

- 7+ years of experience in a high performance institutional investment management firm or similar environment.
- Experience evaluating external investment managers, including quantitative and qualitative analysis, drafting investment recommendations or similar experience.
- Access to a peer/industry network.

***Attributes:***

- Interpersonal skills necessary to interact effectively with Investment Office colleagues, industry peers, external managers, the campus community, and Investment and Advisory Committee members.
- Demonstrated intellectual curiosity, an ability to learn quickly, and an aptitude for taking on new areas of responsibility.
- Excellent oral and written communication skills.
- Demonstrated leadership skills.
- Superior organizational skills and attention to detail including strong project management skills and the ability to manage multiple competing priorities.
- Collegial and collaborative team member; able to work effectively in a small team and contribute to areas beyond the direct scope of responsibility.
- Competence across the Microsoft Office Suite and competence in learning and managing other databases and systems.
- Ability to travel frequently, both domestically and abroad, to assist in conducting due diligence.

**EDUCATION**

- Bachelor's degree required. MBA or CFA preferable but any combination of pertinent academic training and work experience may be considered.

**WORKING CONDITIONS & PHYSICAL DEMANDS**

Work is largely comprised of in-office, desk related tasks including computer work, phone/video calls, and in-person meetings. Work is generally sedentary in nature and is expected to include extended screen time. This position requires travel, estimated at 15-20% of business time. Reasonable accommodations may be made to enable individuals with disabilities to perform these essential functions.

**Williams College has retained Dynamics Search Partners to assist in the search for a Director. For consideration, qualified candidates should provide a cover letter and resume to Wren Zeller, Associate, at [wren@dspny.com](mailto:wren@dspny.com).**