

## NATIONAL INVESTMENT STRATEGIST

Bray Executive Search (formerly RMG Associates) is an executive search firm specializing in private wealth management. We have been retained by a multifamily office to find a National Investment Strategist who will be based in Chicago, IL.

The National Investment Strategist (NIS) is a leadership role with an independent, privately held wealth management and family office advisory firm. This is an exceptional early-stage opportunity to lead the build out of a world class investment platform for private clients of significant wealth. This fast-growing wealth advisory is nationally recognized in the wealth management industry and has attracted top talent in multiple areas of expertise. The NIS will be instrumental in working with the Chief Investment Officer to build out and to continue the development of the firm's investment platform.

This role is for an experienced investment professional to lead private investments and alternatives research efforts for the wealth advisory and family office platform **with a particular focus on alternative investments and private strategies**. The NIS will work collaboratively with advisors under the direction of the CIO to develop, research, recommend, and direct the execution of investment strategies. The responsibilities of this position will cover all asset classes with a particular focus on private fund structures including, but not limited to: hedge funds, private equity, credit, real estate, commodities and infrastructure.

The NIS will work directly for the CIO in leading the firm's efforts in the ongoing creation of an ultra-competitive investment management capability for UHNW/HNW individuals and family clients. The NIS will oversee manager research across all asset classes—traditional and alternative, public and private. Candidates should have either institutional (including endowments and foundations), consulting, or UHNW/HNW experience with a fluid understanding of customizing client portfolios. The NIS will manage analysts and be responsible for market and competitive analysis, risk attribution, strategy implementation, data analysis and modeling, portfolio construction, and performance measurement/evaluation.

In their first full year in business, this firm has had remarkable success garnering multi-billions in assets under management and is rapidly growing. They have a dynamic, entrepreneurial culture and it is imperative that the NIS has the same entrepreneurial spirit and will embrace this aspect of the opportunity. It is a collaborative, team-based group so cultural fit is as important as the candidate's experience and qualifications. This position has highly competitive cash compensation and is a partner/equity role.

### Minimum Requirements:

- Minimum of 10-15 years of due diligence or manager research experience with a reputable asset management firm, consulting firm, wealth advisory firm or institutional investor (E&F).
- Deep knowledge of alternative investments and knowledge of the manager universe, private investments, and experience in a multi-asset class/multi-manager environment.
- Professional designation and/or advanced degree is strongly preferred (MBA, CFA, CAIA, etc.)
- Rapid decision-making ability using a constant well-reasoned approach; ability to manage multiple processes and function in a highly dynamic, fast-paced and team-oriented environment.
- Strong communication skills (writing sample may be requested); client presentation experience is required.
- Set investment policy objectives and guidelines (along with CIO), policy statements; knowledge of operational due diligence concepts is a strong advantage.
- Team player, client-centric individual, able to thrive in a collaborative work culture with top caliber family wealth professionals.

To apply, please submit your resume to [jeannie@braysearch.com](mailto:jeannie@braysearch.com). For more information for qualified candidates, please call Buzz Bray at (206) 402-3401. Inquiries and applications will be held in strict confidence.