

IT'S YOUR MOVE.



Career Opportunities

**MAKE IT COUNT AND CHOOSE STRATEGIC
BUILDING SUCCESSFUL PORTFOLIOS AND REWARDING CAREERS**

STRATEGICGROUP.COM

STRATEGIC INVESTMENT GROUP, A PIONEER IN DEDICATED OUTSOURCED CIO (OCIO) SOLUTIONS SINCE 1987, manages customized portfolios for institutional investors. Our mission is to provide investment solutions to entities of various sizes which cannot or do not wish to build this capability internally.

With over \$27 billion* in assets under management, Strategic is one of the largest dedicated OCIO firms in the industry and offers superb opportunities for a rewarding and successful career.

*As of March 31, 2019.

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strategicgroup.com

Why Strategic?

QUICK FACTS

- » Over \$27 billion assets under management*
- » SEC-registered investment adviser
- » Client mix of pensions, nonprofits (endowments, foundations, and healthcare systems), foreign governments, sovereign wealth funds, captive insurance assets, private investors, and family offices
- » 94 full-time employees*
- » Privately held / broad ownership across approximately 20% of staff
- » Founded November 1, 1987 by former senior pension investment team of the World Bank
- » Centrally located in the Rosslyn neighborhood of Arlington, Virginia, our office is easily accessible by public transportation (Metrobus, Metro's subway system and the D.C. Circulator). Our office is also three (3) miles from National Airport which is also accessible from the Rosslyn metro station.

OUR VISION

To build enduring partnerships with our clients by strengthening their investment programs through a dynamic and customized integrated investment process, sound governance framework, and world-class client service.

OUR MISSION

To empower investors through experience, innovation, and excellence.

FIRM CULTURE

- » Open door policy with access to senior leadership
- » Opportunity to work on substantive assignments across a broad range of organizational functions
- » Stimulating and collegial work environment
- » Culture of intellectual rigor and entrepreneurial spirit
- » Diverse personalities, cultural backgrounds, and experiences that enrich group knowledge and further strengthen the analytical and executive abilities of the team

STRATEGIC THINKING ■ INSPIRED INVESTING

*AUM and staff count as of March 31, 2019.

This material is for informational purposes only and should not be construed as investment advice or an offer of, or solicitation or invitation to subscribe for or purchase security.

The information contained herein represents the opinions of Strategic Investment Group® and is subject to change at the sole discretion of Strategic Investment Group. This document is not intended as a source of any specific investment recommendations and does not constitute investment advice or the promise of future performance. Nothing herein shall constitute an offer of employment.



Photo credit: Brookfield



Strategic prides itself on having a culture that promotes intellectual rigor, entrepreneurial spirit, operational excellence, and world-class client service. Since 1987, the company has built a team of thoughtful, highly accomplished investment professionals who thrive as a cohesive unit and enrich the work environment with their diverse backgrounds and skill sets. We are proud of the diversity of our staff and consider it an important element of our culture.

The company deeply values its employees and supports their efforts to balance work and family life, and to develop themselves professionally through advanced education.



Photo credit: Brookfield - view from Strategic's office



Photo credit: Brookfield - on-site fitness center



Photo credit: Brookfield - rooftop terrace

FULL-TIME & INTERNSHIP OPPORTUNITIES

Each year Strategic Investment Group recruits the best and brightest students from colleges and top universities.

If you are passionate about investment management, and wish to be part of a team that strives for excellence, apply to Strategic.

Please visit www.strategicgroup.com to watch a series of videos that explain what makes Strategic unique.

Compensation and Benefits Summary

Cash, Bonus and Long-Term Incentives

- » Competitive base salary, paid semi-monthly
- » Annual discretionary bonus for all employees based on individual and Strategic's performance
- » Additional discretionary bonus pool for Director-level and below

Medical and Rx Insurance

Open Access Plan (OAP) | Health Savings Plan (HSA) | Rx

- » Immediate eligibility
- » Strategic pays 80% of the premium cost for employees and 55% for dependents
- » PPO medical coverage
 - Open Access Plan (OAP)
 - Health Savings Plan (HSA)
 - Strategic contributes one-half of the deductible each year
 - \$750 towards Individual deductible
 - \$1,500 towards Family Aggregate deductible
- » Prescription drug coverage
 - Retail and mail order options available

Dental Insurance

- » Strategic pays 80% of the premium cost for employees and 55% for dependents

Vision Insurance

- » Strategic pays 80% of the premium cost for employees and 55% for dependents

Student Loan Paydown

- » \$200 per month up to \$10,000 for qualified student loans

401(k) Retirement Savings Plan

- » Immediate eligibility
- » Strategic matches dollar for dollar up to 4% of your pay
- » Immediate vesting on 401(k) match
- » Generous discretionary year-end profit sharing contribution (subject to vesting schedule)
- » Brokerage option

Flexible Spending Accounts

- » Pre-tax Medical and Dependent Care Spending Accounts

Salary Continuation

- » Short-Term Disability
 - After one year of service
 - 100% of base pay up to 6 weeks
 - 7+ weeks, 60% of base pay to \$5,000 per week
 - < One Year of Service
 - 60% of base wage to \$5,000 per week
- » Long-Term Disability
 - After 26 weeks of qualified disability, 60% of monthly salary to a maximum of \$12,500 to age 65

Life and AD&D Insurance

- » Strategic pays 100% of the premium
- » 1x base salary up to \$200,000 in coverage

Long-Term Care Insurance

- » Strategic pays for premium of base benefit of \$1,000 per month of coverage
- » Opportunity to purchase additional coverage

Compensation and Benefits Summary

Paid Parental | Caregiver Leave

- » Eligibility — 1 year of service
- » Paid Parental Leave
 - 2 weeks for any new parent
- » Paid Primary Caregiver Leave
 - Additional 8 weeks for primary caregiver

Employee Assistance Program (EAP)

- » Confidential, free counseling services offering support and guidance to help resolve personal issues

Paid Time Off

- » Three weeks of annual vacation, increases based on length of service
- » Ten sick days (up to three per year may be used as personal days)
- » Ten holidays

Matching Gift Program

- » Up to \$250 per year for qualified charities
- » 2x match to \$500 if employee is an active volunteer with charity

Training and Development

- » Tuition reimbursement up to annual IRS maximum
- » Educational Lunch Series
 - Key staff present topics on relevant subjects
- » CPA and CFA certifications:
 - Strategic pays registration and exam fees and any required study materials
 - Time off to study for CPA and CFA exams, up to three days

- » CFA Institute Investment Foundations Certificate Program
 - \$500 bonus upon successful certification
- » Payment of selected professional society dues and certifications

Location | Parking | Mass Transit

- » Modern offices with sweeping views of the Potomac River, Georgetown and D.C. monuments
- » Pre-tax deductions from payroll for parking and/or the SmartBenefitsSM program, subject to IRS maximums
- » Mass transit accessible
 - Rosslyn Metro Station three blocks from office
- » Secure bike room
- » Rooftop terrace and lounge
- » Electronic vehicle charging station
- » Onsite state-of-the-art fitness center, towel service and showers — no fee
- » 24-hour security in building

Other Benefits

- » Employee Home Computer Purchase Program
 - Full-time staff members are eligible
 - Strategic reimburses half (up to \$1,000) of a qualified purchase
- » Complimentary vending, fruit and snacks
- » Automated lunch ordering and delivery
- » Voluntary Life Insurance
- » Travel Assistance
- » Prepaid Legal Services
- » Monthly on-site masseuse
- » Annual on-site complimentary flu clinic and biometric screening

POSITION DESCRIPTION

Analyst, Investment Management

Strategic Investment Group (Strategic) a pioneer in dedicated Outsourced CIO (OCIO) solutions since 1987, offers a comprehensive service platform for managing customized portfolios for institutional and private investors. Our proprietary process combines active portfolio management, rigorous risk management, and open architecture manager selection.

Strategic functions as our clients' investment partner and co-fiduciary, effectively becoming an extension of their resources. Clients are then free to focus on their core businesses, while we focus on providing the highly specialized portfolio management that clients need to meet their investment goals. Depending on a client's needs and preferences, Strategic can orchestrate the management of an entire portfolio comprising multiple asset classes, focus on specific asset classes, such as alternatives (e.g., hedge funds, real estate, and/or private equity) or international investments, or manage strategies with high potential for adding value (e.g., portable alpha through investor-friendly turnkey structures). Customized liability-driven investing (LDI) solutions, whether through an integrated total portfolio approach or a targeted long-duration strategy, are also available, as are solutions that address mission-related investment objectives.

We strive to build enduring partnerships with our clients by strengthening their investment programs through a dynamic, value-enhancing investment process, sound governance framework, and world class client service. Our mission is to empower investors through experience, innovation, and excellence. Visit our website at www.strategicgroup.com for more information.

The Analyst is responsible for supporting a variety of internal functions related to managing institutional investment portfolios. Monthly responsibilities include collection and reconciliation of portfolio valuation, transaction, benchmark and other investment related data as well as other ongoing investment related projects. This position is critical to the investment management process and analyst reports are one of Strategic's primary communications with our clients.

Essential Duties and Responsibilities (Other duties may be assigned to meet business needs):

- Support investment and risk management process through collection and reconciliation of portfolio valuation, transaction, benchmark and other investment related data for sub-manager, direct and derivative instrument investments in equities, fixed income, hedge funds, private equity, real estate and commodities.
- Interact with array of external parties, including but not limited to investment managers, client representatives, auditors and custodians to communicate portfolio results.
- Create deliverables to facilitate the investment process and client investment reports.
- Analyze and monitor client performance and risk in relation to market environment and the client's policy.
- Perform performance attribution, risk analysis and other quantitative assessments of portfolio performance.
- Attend monthly and quarterly internal investment meetings as required.

- Projects related to broad array of institutional investment areas including but not limited to statistical analysis of historical investment data, portfolio policy design related research, internal portfolio management systems development, and support of client reviews and business development efforts.

In addition, the Analyst is expected to interface regularly with internal investment staff and client service staff on both broad investment and client specific topics. The Analyst is expected to perform independent analysis on various client issues, evaluate options and make recommendations. Additional interaction and relationship management with clients, investment managers and custodians is expected. Pursuit of the *CFA® designation is strongly encouraged and sponsored by Strategic.

Qualifications/Requirements:

- Bachelor's degree in Finance, Economics, Engineering, Mathematics or Accounting.
- Strong understanding of relevant financial, mathematical and accounting techniques.
- Strong organizational, quantitative and analytical skills, detail-oriented and ability to multi-task.
- Ability to independently manage projects and meet deadlines under minimal supervision.
- Proven proficiency in utilizing spreadsheets and presentation software.
- High degree of professionalism with superior written and verbal communication skills.
- Ability to work in a team atmosphere with other professionals.
- Ability to work under pressure in a fast-paced environment.

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