



## Position Description

**Position Title:** Chief of Staff  
**Department:** CEO  
**Reports To (Functional Title):** CEO  
**Date:** June 2019

### **BASIC PURPOSE/FUNCTION:**

Ensure streamlined activities within the organization based on the priorities of the Executive Chairman and CEO. This includes organizing and prioritizing critical issues and required information for the CEO to facilitate efficient decision making. The Chief of Staff will be responsible for handling communication and representing the CEO to internal and external parties including the Company's public company Board of Directors, shareholders, clients and new business leads. Project manage strategic projects by liaising with all constituents. Ability to create order in a complex business environment. Asset management or Investment banking experience of 2 to 3 years preferred.

This position will provide exposure to all aspects of the business. Incumbent expected to stay in role approximately 3 years prior to transitioning to a functional area within the business to manage a business unit.

Specifically, the Chief of Staff act as an executive in training and will be primarily be responsible for:

### **PRIMARY DUTIES AND RESPONSIBILITIES:**

	<b><u>% of Time</u></b>
1. Direct executive support: Work with CEO to identify, set and maintain strategic priorities. Strategically manage CEO's time by assessing external opportunities, travel and meeting plans, prioritize based on strategic plan, and proactively plan all logistics for travel and meetings.	30%
2. Prepare for and follow up on meetings: Prepare CEO for upcoming meetings by ensuring all information necessary is available in advance to be productive and make efficient decisions. Accompany CEO to meetings and take notes, manage appropriate follow through with internal and external parties including the Company's public company board of directors, shareholders, clients and new business leads.	30%
3. Help oversee complex, often cross-functional, organization-wide projects or initiatives that involve the CEO, including driving decisions and bringing together stakeholders.	20%
4. Manage internal and external communications on behalf of the CEO: may include drafting letters, emails, reports and presentations on behalf of the CEO	15%
5. Meeting and event planning: Oversee and coordinate meeting and events with clients, Affiliates and employees.	5%

Total: 100%

**Position Title:** Chief of Staff

**EDUCATIONAL REQUIREMENTS:**

- |  |   |
|--|---|
| <input type="checkbox"/> High School Diploma or GED    | <input checked="" type="checkbox"/> Master's Degree:<br>Preferred |
| <input type="checkbox"/> Associate or Technical Degree | <input type="checkbox"/> Doctorate Degree                         |
| <input checked="" type="checkbox"/> Bachelor's Degree  | <input type="checkbox"/> Certificate/License                      |

**PRIOR WORK EXPERIENCE REQUIRED:**

- |  |   |
|--|---|
| <input type="checkbox"/> Less than 1 Year        | <input type="checkbox"/> 5 to 8 Years     |
| <input type="checkbox"/> 1 to 3 Years            | <input type="checkbox"/> 8 to 10 Years    |
| <input checked="" type="checkbox"/> 3 to 5 Years | <input type="checkbox"/> 10 Years or More |

**NECESSARY SKILL SET:**

1. Natural curiosity and drive to execute projects independently and an entrepreneurial spirit to continually improve processes. A positive, proactive attitude and flexibility in a dynamic team environment.
2. An exceptional standard of quality: this role requires significant attention to detail, strong organization and project management skills, problem-solving, and accountability for excellent results.
3. Exercises the highest degree of confidentiality, professionalism, and integrity at all times.
4. Excellent people skills with an emphasis on careful listening, relationship building, and strong written and oral communications. Ability to effectively communicate with all levels within BSIG, Affiliates and clients.
5. Deadline driven and ability to independently prioritize multiple projects.
6. 2 to 3 years of asset management industry/investment banking experience a preferred.
7. Flexibility to travel both domestic and international with CEO.

The preceding Position Description has been designed to indicate the general nature and level of work performed by employees within this qualification. It is not designed to contain or be interpreted as a comprehensive inventory of all duties, responsibilities, and qualifications required of employees assigned to this position.

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