



# BRIGHTSPHERE

Investment Group

## Position Description

**Position Title:** Business Analyst  
**Department:** Affiliate Management  
**Reports To:** Head of Affiliate Management, Head of Global Distribution and Director Product Development and Strategy  
**Date:** August 2019

### BASIC PURPOSE/FUNCTION:

The Business Analyst will support senior members of the Affiliate Management and Distribution teams on various initiatives which will include:

1. Distribution - focus on database management, marketing research, and sales support.
2. Portfolio Analysis and Market Research - track and analyze investment performance, key market trends, and the competitive landscape
3. Affiliate Management – support business oversight and financial and investment analysis.

The analyst will work in a team environment with exposure to BSIG leadership and Affiliates. This position requires strong attention to detail, communication skills, and teamwork orientation to work well in a collaborative environment. Specifically, the Business Analyst will be primarily responsible for:

### PRIMARY DUTIES AND RESPONSIBILITIES:

### % of Time

- 1. Distribution - Manage Research, Market Intelligence, and Database Mgt.** 40%
  - Subject matter expert on Salesforce responsible for user training, report design, generation, and analysis
  - Produce product and competitive analyses on key investment strategies in support of both domestic and global sales opportunities
  - Update relevant databases with strategy and firm data
  - Assist in the production of RFPs and RFIs
  - Proactively identify sales opportunities by leveraging various industry databases and prospecting tools
  - Liaise with Affiliates to collect relevant marketing materials and manage dissemination of materials within BSIG organization
- 2. Portfolio Analytics - Performance and Market Research** 40%
  - Support the investment performance process through timely and accurate analysis and dissemination of investment performance results
  - Develop, maintain, and articulate a strong working knowledge and understanding of the investment markets, products, and client asset allocation trends
  - Assist in the creation of presentations and other documents to support AMT in strategic decision making and execution of projects related to managing and growing the portfolio of Affiliates

### **3. Affiliate Management - Business Oversight, Analysis, and Reporting**

20%

- Produce, monitor, and interpret Affiliate-level and consolidated reports covering net client cash flows, financials, and investment performance
- Interpret and articulate trends and insights related to Affiliate data
- Responsible for monthly and quarterly Affiliate Management reporting and BSIG Board materials

Total: 100%

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.

BrightSphere Investment Group is a holding company for seven investment boutique firms. All investment advisory, mutual funds, and other products are managed and offered by BrightSphere Affiliate firms and not by BrightSphere.

BrightSphere is an equal opportunity employer. No employee or applicant shall be discriminated against on the basis of race, religion, color, sex, age, national origin, sexual orientation, genetic information, veteran status, disability, or any other category protected by law.

**Position Title:** Business Analyst

**EDUCATIONAL REQUIREMENTS:**

- |  |  |
|--|--|
| <input type="checkbox"/> High School Diploma or GED    | <input type="checkbox"/> Master's Degree     |
| <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 checked="" 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. Advanced Microsoft Office skills, particularly Outlook, Word, PowerPoint, and Excel. Candidate must have excellent written and verbal communication skills
2. Natural curiosity and an interest in the Asset Management industry
3. Exceptional attention to detail, solid proofreading skills, and strong organizational skills
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 and with the Affiliates
5. The ability to prioritize and multi-task in a dynamic and fast-paced environment. The ability to remain calm under pressure is critical. Must have a solid sense of integrity and the ability to manage confidential and time sensitive information
6. A positive, proactive attitude and flexibility to work effectively in a collaborative, team environment
7. Advance knowledge of Excel and PowerPoint required; familiarity with Salesforce, Callan PEP, Mercer GIMD, and eVestment is a plus

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