



Position Description

Position Title: Affiliate Management Associate
Department: Affiliate Management
Reports To: SVP, Head of Affiliate Management
Date: October 2019

BASIC PURPOSE/FUNCTION:

BrightSphere is a diversified asset management company with over \$200 billion in assets under management. We offer more than 100 distinct, active investment strategies through seven leading institutional asset management firms to sophisticated investors around the world. BrightSphere supports the growth and expansion of our Affiliates, collaborating in new product development and extending product reach into high-demand international markets

BSIG's Affiliate Management Team (AMT) is responsible for ensuring alignment of interests between the Affiliates and BSIG, achieving stability and growth of Affiliate earnings to protect franchise value, and supporting BSIG growth initiatives, capital needs, and new business activities. The AMT collaborates across a diverse set of initiatives including: Portfolio Management: oversight of Affiliate businesses and partnering with Affiliates on strategic growth initiatives

- Investment Research: performance analytics and product research across the Affiliates and at the consolidated level
- Corporate Development: growing BSIG's platform through acquisitions

The Affiliate Management Senior Associate will support senior AMT members with a primary focus on Portfolio Management activities but will have exposure to all of the group's cross-functional projects. The Affiliate Management Senior Associate will work in a team environment on various Affiliate-focused initiatives that involve strategic development, business oversight, financial and investment analysis, and knowledge management. This role will have exposure to BSIG's leadership and other functional areas, as well as to BSIG's Affiliates.

PRIMARY DUTIES AND RESPONSIBILITIES:

1. Strategic Development

- Perform Affiliate-level due diligence, financial modeling, and data analysis
- 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
- Develop, maintain, and articulate a strong working knowledge and understanding of the market, products, and investment trends

% of Time

40%

2. Projection Execution

- Provide support and coordination on AMT's cross-functional work with other BSIG groups such as Legal, HR, Risk, Compliance, Finance,

40%

Distribution, and IT/Operations

- 3. 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 processes for cross-functional meetings and BSIG Board meetings

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: Affiliate Management Senior Associate

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 checked="" type="checkbox"/> Certificate/License:
CFA or progress towards a plus |

PRIOR WORK EXPERIENCE REQUIRED:

- | | |
|--|--|
| <input type="checkbox"/> Less than 1 Year | <input checked="" type="checkbox"/> 5 to 8 Years |
| <input type="checkbox"/> 1 to 2 Years | <input type="checkbox"/> 8 to 10 Years |
| <input checked="" type="checkbox"/> 2 to 4 Years | <input type="checkbox"/> 10 Years or More |

NECESSARY SKILL SET:

1. Natural curiosity and drive to execute projects independently; 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, organization, strong financial modeling skills and analytical capabilities, problem-solving, and accountability for excellent results
3. 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
4. Deadline driven and ability to independently prioritize multiple projects
5. Prior financial services experience required
6. Asset management industry experience required
7. Advanced knowledge of Excel and PowerPoint required

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