



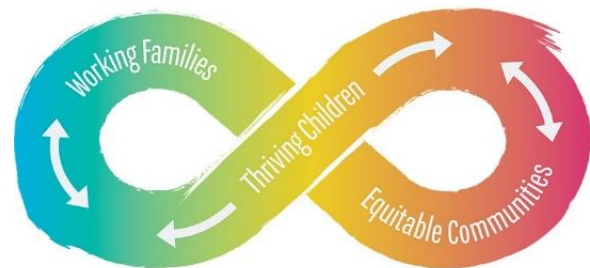
## Investment Analyst

Battle Creek, Michigan

### THE W.K. KELLOGG FOUNDATION

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The **W.K. Kellogg Foundation** with headquarters in Battle Creek, Michigan is a leading philanthropic institution supporting thriving children, working families, equitable communities, and the dynamic connection between the three. As one of the top ten largest foundations in the United States with an \$8.5B endowment, WKKF funds organizations nationally and in its priority places of Michigan, Mississippi, New Mexico, New Orleans, Haiti, and Mexico and works in partnership with grantee organizations and the communities they serve to advance positive change.



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*“The W.K. Kellogg Foundation supports children, families, and communities as they strengthen and create conditions that propel vulnerable children to achieve success as individuals and as contributors to the larger community and society.”*

### THE OPPORTUNITY

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The **Investment Analyst** role offers an extraordinary opportunity for contribution and continued apprenticeship in support of the development of the Foundation’s investment strategy and achievement of its goals. The Investment Analyst will support and collaborate with a small but mighty senior investment team on public equity investment decisions, hedge fund investment decisions, and management of the assets of the Trust. The role will provide exposure to the foundation’s entire portfolio, domestic and international travel opportunities, and a seat at the table when meeting and developing relationships with investment managers. The W.K. Kellogg Foundation also offers a strong benefits package and reimbursement for those seeking growth and development through continued education and certifications.

The foundation is hiring two Investment Analysts: one focusing on Global Equities and the other focusing on Hedge Funds and Fixed Income.

### YOUR POTENTIAL IMPACT

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The primary function of the Investment Analyst role is to support senior investment team members in developing long-term public assets investment strategies and philosophy through:

#### Manager Knowledge and Relationships

- Develop and maintain database on external managers

- Identify and develop relationships with best-in-class managers, supporting consultants, and other third-party entities

#### **Investment Opportunity Analysis and Execution**

- Conduct investment, risk, legal, and operational due diligence to make informed investment recommendations
- Conduct portfolio monitoring and reporting

Your work and the work of the investment team at the Foundation ensures a healthy corpus which in turn helps to increase the dollars being distributed into communities and organizations supporting the conditions for thriving children and families.

#### **CANDIDATE PROFILE**

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Success in the Investment Analyst role will require a passion to further the W.K. Kellogg Foundation's mission and a commitment to core values of diversity and inclusion, intercultural awareness, openness, collaboration, and stewardship. The ideal candidate will also possess the following professional abilities, attributes, and experiences:

- Bachelor's degree in relevant field (business, economics, or similar quantitative field), with 3-5 years of professional experience
- Knowledge of capital markets including, but not limited to, equity and/or fixed income markets and asset class knowledge; experience with FactSet and Bloomberg preferred
- Ability to evaluate investment opportunities using existing theoretical and conceptual skills, statistical and technical skills including PowerPoint and advanced Excel
- Progress toward obtaining Chartered Financial Analyst certification strongly preferred

Salary range is \$92,300-\$126,900. Actual starting salary of candidate will be commensurate with years, breadth, and depth of relevant experience, education, certifications, credentials, special skills, accomplishments, and other factors relevant to the position.

#### **TO APPLY**

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More information about the **W.K. Kellogg Foundation** may be found at: [www.wkkf.org](http://www.wkkf.org)

This search is being led by [Katherine Jacobs](#), [Sharon Gerstman](#) and [Emily McCarthy](#) of [NPAG](#). Due to the pace of this search, candidates are strongly encouraged to apply as soon as possible. Candidates may submit their cover letter, outlining their interest and qualifications, along with their resume via NPAG's [website](#).

**The W.K. Kellogg Foundation is an equal opportunity employer and proudly values diversity.  
Candidates of all backgrounds are encouraged to apply.**