

## Meradia Senior Performance Consultant

### REQUIREMENTS

- Provide guidance to the client through the successful development and integration of new systems and operational processes
- Analyze business requirements by gathering information, validating logic, feasibility and testing assumptions, and make them actionable for development
- Document existing operational procedures and define new processes based on update tools and/or data
- Provide clients with research and insight relating to software applications and technology, operations processing, reporting, and performance measurement
- Develop and maintain project plans, status memos, procedural and operational documentation
- Mentorship and direction of junior consultants on assigned projects
- Appetite to both lead efforts and to be a business analyst (testing, sql queries) and everything in between given the need for our consultants to be flexible
- Ability to travel - you will likely spend a significant amount of time onsite with our clients. This travel can be as much as 80% to 100% of a work week and may be international. In addition, you must have a valid driver's license as many clients are not within range of public transportation.

### SKILLS & ABILITIES

- Strategic thinking; transformations are difficult and the ideal candidate will help our clients navigate them successfully
- Experience designing, developing and implementing technology solutions in the investment services industry
- Experience managing systems implementation and development projects that impact multiple departments and redefine operational processes
- Proven record of analyzing business processes and developing practical solutions that drive efficiency, improve client service, and reduce risk
- Ability to assess and document business needs including systems, data, integration, workflows, output, reports and the economic/operational impact of each
- Strong analytical and data testing skills
- Excellent interpersonal, verbal, and written communication skills

### KNOWLEDGE & EXPERIENCE

- Strong functional, technical, and operational expertise of the investment management industry
- Fundamental knowledge of front, middle and back-office operations in investment management organizations, with a strong understanding of institutional client reporting
- Strong knowledge of a broad range of investment management products including US and global equities, fixed income and derivative products
- Understanding of multi-currency portfolio accounting and fund administration platforms
- Experience preparing portfolio accounting data (IBOR/ABOR/etc) into performance measurement ready data
- Deep experience in back and middle-office operations, ideally performance measurement, portfolio analytics and/or benchmark relative attribution analysis
- Basic knowledge of data query tools and SQL preferred
- MBA, CFA charter holder or candidate, CIPM or CAIA designee, or candidate strongly preferred
- Experienced with tools like, FactSet, RIMES, BNYM/Eagle, SIMCORP, Confluence, SS&C products

## EDUCATION

- Bachelor's degree or equivalent experience specializing in Economics, Finance, Accounting, and/or Management
- 8+ years of relevant experience in the financial industry
- Prior experience in investment management and/or consulting within the industry