

WE'RE HIRING



## Associate / Senior Associate – Private Market Investments



HEB Manitoba is an independent jointly trustee organization, managing pension and benefit plans for over 89,000 active and retired healthcare workers in Manitoba. With approximately \$10 billion in assets, we are the largest pension plan in Manitoba and rank 30<sup>th</sup> in Canada.

We are seeking results oriented professionals who work well in a small team environment with the passion and desire to add value to our private market portfolio. Depending on qualifications, the successful candidate(s) will join the private markets group as an Associate or Senior Associate in our Winnipeg office.

### Why join our team?

We are offering you a unique and exciting opportunity to join a team that is responsible for managing a private market allocation of over \$3 billion and growing. Our private markets group manages a global multi-asset investment portfolio allocated to real estate, infrastructure, private equity and private debt. You will have an opportunity to make an immediate impact, grow professionally and accelerate your career in a growing organization. Potential career path from this role is to a portfolio manager position in the private markets group.

### Position Summary

Reporting to the Head of Private Markets, Senior Portfolio Manager, your primary role will include performing investment analysis and due diligence on investment managers and co-investment opportunities, portfolio monitoring, and conducting asset class research. The positions are multi-disciplinary, covering real estate, infrastructure, private equity and private credit.

The ideal candidate for this position is someone with experience as an investment analyst, M&A or transaction advisory role, corporate development, corporate banking, or investment banking.

### Specific Accountabilities

- Participate in the sourcing, pre-screening and evaluation of prospective fund commitments and syndicated co-investments
- Perform advanced quantitative and qualitative due diligence and analysis
- Monitor and review the performance and risk profile of our existing investments
- Analyze and report on underlying asset class performance and risk
- Build and maintain financial models, spreadsheets and databases
- Actively participate in due diligence and investment manager meetings
- Prepare reports and presentations for decision makers and the Investment Committee
- Coordinate investment operational activities with other HEB departments as needed
- Conduct ad hoc investment related research as assigned
- Develop and maintain relationships with industry participants including other limited partners, general partners and placement agents

## Qualifications and Competencies

### *Experience & Education*

- Minimum of an undergraduate degree in a related field (finance, accounting, economics, business administration)
- CFA or CAIA designation (or enrollment) is viewed favourably
- Other professional accreditations plus relevant work experience will also be considered (e.g. CPA, CBV)
- Minimum relevant experience of 3 years (associate) and 6 years (senior associate) in the investment industry or a related business/finance field (e.g. corporate banking, business valuations, corporate development, transaction advisory, M&A, etc.)

### *Competencies*

- Business ethics and integrity demonstrated at a high level
- Practical knowledge of accounting concepts and investment theory
- Self-starter capable of working independently and as part of a collaborative team
- Strong work ethic and an ability to multitask under tight timelines
- Strong problem-solving and critical thinking skills
- Diligent and inquisitive
- Excellent analytical skills with strong attention to detail and accuracy
- Strong written and verbal communication skills and the ability to communicate recommendations effectively
- Advanced knowledge of Microsoft Office suite of programs (Excel, PowerPoint, Word)
- Experience with Power BI is considered a plus but not a requirement
- Willing to travel

### **How to Apply**

HEB Manitoba offers a competitive and comprehensive compensation and benefits package including defined benefit pension plan, medical, dental, life insurance, disability and support for professional development.

To apply for this exciting and challenging position, please forward your cover letter and resume to [hr@hebmanitoba.ca](mailto:hr@hebmanitoba.ca) with the subject line "Associate / Senior Associate".

**Application Deadline: March 24, 2023**

*We thank all applicants, however, only those selected for an interview will be contacted.*