



**Investment Fund Managers** plan, direct, or coordinate investment strategy or operations for a large pool of liquid assets supplied by institutional investors or individual investors.

#### Example Positions

*Assistant Vice President, Investment Analysis; Equity Analyst; Fixed Income Portfolio Manager; Investment Analyst; Lead Portfolio Manager; Portfolio Manager; Senior Investment Analyst; Senior Portfolio Manager; Vice President and Portfolio Manager; Vice President, Fixed Income*

## Competencies

**Strategic Thinking** – Investment Fund Managers who exhibit this competency develop and help drive a shared understanding of a long-term vision that describes how the organization needs to operate now and in the future.

**Analytical Thinking** – They grasp the underlying concepts in complex information, are able to identify root causes of problems, and formulate solutions based on a synthesis of information.

**Decisiveness** – Individuals who exhibit this competency tend toward taking calculated risks by making decisions and taking action, even in the absence of all information.

**Influence and Persuasion** – These Investment Fund Managers are effective in persuading, convincing, influencing, or impressing others in order to get them to support a specific agenda, make a specific type of impression, or take a specific course of action.

**Business Acumen** – These individuals make sound business decisions based on a strong understanding of the company's business model, strategic goals, and relevant policies, as well as best practices and current technologies in their own discipline or functional area.

**Planning and Priority Setting** – They identify the priorities, processes, and practical actions that are necessary to achieve an objective or realize an idea. This competency requires developing detailed action or project plans including objectives, accountabilities, time frames, standards, review stages, and contingencies.

**Comfort with Ambiguity** – Investment Fund Managers are at ease in work situations without clear guidelines, structure, or known outcomes. They are able to operate effectively within ambiguous environments and view novel situations as challenges rather than as stressors.

**Achievement Motivation and Perseverance** – Individuals who exhibit this competency display a determination to achieve ever-increasing levels of performance. This competency involves setting high standards and challenging goals for oneself, others, and the organization, and requires a constant focus on achieving and exceeding those goals.

## Representative Behaviors

- Thinks strategically to promote growth or gain competitive advantage
- Analyzes large amounts of information to determine trends, patterns, and connections in data
- Takes decisive action in high-stakes situations
- Persuasively sells ideas to gain support and buy-in
- Understands and leverages the drivers of company's business
- Accounts for interim milestones, objectives, and deadlines when setting long-term priorities
- Takes risks when necessary to make decisions when little guidance or information is provided
- Is willing to exert extra effort or work long hours to achieve objectives



## Investment Fund Manager Job Model

Leading	Active Communication	Interpersonal Dynamics	Making Decisions	Solving Problems	Managing Processes	Self-Management
Leadership Maturity	Influence and Persuasion	Interpersonal Sensitivity	Deliberative Decision Making	Creativity and Innovation	Quality Focus	Composure and Resiliency
Leadership Communication	Conflict Management	Helpfulness	Decisiveness	Analytical Thinking	Compliance	Generating and Expressing Enthusiasm
Driving Results	Negotiating	Service Focus	Strategic Thinking	Learning Agility	Response Orientation	Strength of Conviction
Leading Change	Active Listening	Relationship Building	Organizational Citizenship	Scientific Acumen	Safety Focus	Achievement Motivation and Perseverance
Managing Innovation	Communicating	Collaboration and Teamwork	Information Seeking	Business Acumen	Process Management	Self-Awareness
Managing Quality	Instructing	Organizational Savvy			Time Management	Adaptability
Team Building		Global Mindset			Planning and Priority Setting	Initiating Action
Coaching and Developing Others					Organizing and Documenting Information	Accountability
Delegating					Applying Standard Practices	Professionalism
Fact-Based Management						Continuous Learning
Strategic Talent Management						Extended Task Focus
Directing						Comfort with Ambiguity