

## **Metis Global Partners**

### **Operations Specialist**

#### **Position Profile**

#### **METIS GLOBAL PARTNERS**

Metis Global Partners, LLC is a diverse/woman-owned and led institutional global equity manager founded in 2013 and based in San Diego, California. The firm's active value-oriented Global, International and Emerging Market systematic strategies have enjoyed recently renewed interest in Value investing. In addition, response to Metis' Beta capabilities launch in 2021 has been very positive, with inflows to date exceeding \$1 billion over the last year and 25+ new institutional Beta clients. In 2022, Metis plans to launch its Guided Beta™ strategies to provide clients with customized Beta solutions including Climate Aligned and ESG Beta strategies.

Metis is experiencing dynamic growth and maintains an entrepreneurial culture with opportunity for team members to make significant contributions and grow with the firm. Working at Metis, you'll be empowered to contribute meaningfully to a rapidly growing company. You'll be involved in the long-term evolution of the firm, helping to build the Metis of the future. And you'll be able to serve an agent of change in the industry, supporting the growth of Diversity and Inclusion through a diverse/woman-owned organization.

Cognitive diversity and intellectual curiosity are guiding lights at Metis, allowing the firm to embrace and harness unique perspectives into the management and day-to-day operations of the firm. This, combined with a flat organizational structure, allows contribution of opinion and thought to flow freely.

## POSITION SUMMARY

Metis is hiring an Operations Specialist, with a long-term opportunity to expand into a more senior role as the firm grows. The responsibilities of an Operations Specialist involve interfacing with team members and service providers on matters related to:

### ***Client account activity and reporting***

The client account setup process as well as incoming and outgoing cash flows; ensuring appropriate documentation, verifying necessary information, confirming proper systems entries and communication flow both internally and externally; to ensure timely production and distribution of client reports.

### ***Portfolio accounting/trade settlement***

Monitoring reconciliation reports and communication flows to identify and address unresolved trade settlement issues and other portfolio accounting-related matters.

### ***Account and composite performance and GIPS compliance***

Calculation of performance and adherence to GIPS policies and procedures.

### ***Commingled fund operations***

Numerous operational matters regarding the firm's commingled private funds, including reporting, accounting, account setup, portfolio valuation, expense management, fee calculations and more.

### ***Compliance testing***

Review of relevant firm documents, processes, and reports, discussions with team members regarding activities related to the firm's code of ethics, and more.

## **Required Skills**

- Heavy attention to detail
- Strong communication skills, both verbal and written
- Dependable and able to self-motivate, work independently, and handle multiple functional areas as part of a small firm
- Knowledge regarding/comfort with equities, valuation/pricing, back-office operations, performance, compliance, and commingled funds – operations and accounting
- Advanced Excel skills

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- Knowledge of/experience with custodian and fund administration software platforms a plus
- Working knowledge of/experience with GIPS a plus

## QUALIFICATIONS

Bachelor's degree is preferred.

## COMPENSATION

Our client is prepared to offer a very attractive compensation package, including a competitive base salary as well as health, 401(k), and vacation benefits.

## Equal Employment Opportunity Policy

Our client provides equal employment opportunities (EEO) to all employees and applicants for employment and prohibits discrimination and harassment based on race, color, religion, gender, gender identity, national origin, sexual orientation, age, disability, or veteran status.

## CONTACT

The Lawrence Advisory has been engaged by the client to help in this confidential search. The search is being led by:

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Founder & CEO

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Please submit letters of interest and resumes to:

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#### ABOUT THE LAWRENCE ADVISORY

The Lawrence Advisory is a human-capital consulting firm that offers Executive Search, Organizational Development and Leadership Coaching. We specialize in servicing innovative organizations with distinct cultures. For more information, refer to our website at <http://www.thelawrenceadvisory.com>.