



Hershey Trust Company Position Description

Position: Investment Analyst/ Junior Investment Analyst
Date Revised: June 1, 2022
Reports To: Vice President, Equities & Deputy Chief Investment Officer

The Hershey Trust Company (“HTC”) helps to advance the legacy and vision of Milton and Catherine Hershey in perpetuity through excellence in asset management and trust administration. HTC’s mission is to enable the Milton Hershey School Trust, The M.S. Hershey Foundation and the Hershey Cemetery Perpetual Care Trust to achieve their long-term goals, by serving with excellence as their Trustee and asset manager. As a trusted and valued partner, we work collaboratively among the group of Hershey entities who collectively preserve and advance the Hershey legacy.

General Position Description and Principal Accountabilities:

- The Analyst, under the supervision of the VP, Equities & Deputy CIO, will assist the senior investment team with due diligence, modeling, and monitoring of the portfolio of the Milton Hershey School, M.S. Hershey Foundation, and Hershey Cemetery Trusts.
- Analyze and monitor portfolio performance attribution and risk metrics in alignment with investment policies and guidelines.
- Manage returns attribution analysis for public managers and financial statement/ quarterly report analysis for private managers with the ability to summarize findings.
- Participate in meetings with external investment managers, consultants and third-party service providers and create summary notes for senior investment staff.
- Assist senior investment staff with reviewing business terms within investment management agreements and other various legal documents.
- Follow-up on inquiries from managers including analysis of request and gathering and preparing necessary documentation.
- Assist with ongoing portfolio monitoring via monthly analytics reporting, and investment meeting reviews.
- Prepare required documentation for trades and follow-up to any questions pertaining to trades including obtaining and gathering additional supporting documentation and information.
- Prepare, edit, organize, analyze, and review material for senior investment staff and Board meetings, presentations, and inquiries on a range of subjects from internal matters to educational or broad investment areas of interest.
- As part of the investment team, contribute to development of investment policy, asset allocation and rebalancing, benchmarks, risk management and portfolio structure recommendation.



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Minimum Qualifications:

All employees are expected to demonstrate our Core Values of **Teamwork, Integrity, Respect, Impact** through their words and their actions. In addition, this role requires a broad base of business knowledge and subject matter expertise, typically acquired through a combination of education, certification and prior work experience, as follows:

Education and Experience

- Strong academic credentials and base of knowledge typically acquired through a Bachelor's Degree in Finance, Economics or Accounting required.
- One to three years of investment management experience in an institutional setting such as an endowment / foundation, pension plan, consultant, or asset management firm is preferred.

Certifications/Designations

- Progress toward/willingness to pursue CFA designation or other relevant certification strongly preferred.

Knowledge, Abilities, and Skills:

- Strong quantitative and qualitative analytical abilities.
- Strong verbal/written communication and interpersonal skills .
- Must be motivated by and value the important mission of Milton Hershey School and M.S. Hershey Foundation; and contribute to the success of their missions.
- Advanced proficiency to manage financial databases such as Bloomberg, analytical software (Microsoft products particularly Excel), custodian and investment manager contract issues, etc.
- Unquestioned personal and professional integrity, ethics and reputation with a high level of emotional intelligence, cultural sensitivity and flexibility as well as a strong commitment to excellence and service.
- Record of exceptional collaboration.
- Ability to prioritize timelines to ensure deadlines are met without sacrificing quality and accuracy.
- Works well in a team setting and is self-motivated to achieve goals and actively supports broader portfolio and Trust Company goals and initiatives.

FLSA Classification: Exempt

HTC classification: Full-time



Hershey Trust Company Position Description

Hershey Trust Company is an equal opportunity employer. All aspects of employment including the decision to hire, promote, discipline, or discharge, will be based on merit, competence, performance, and business needs. We do not discriminate on the basis of race, color, religion, marital status, age, national origin, ancestry, physical or mental disability, medical condition, pregnancy, genetic information, gender, sexual orientation, gender identity or expression, veteran status, or any other status protected under federal, state, or local law

How to Apply / Contact with Questions: Careers@HersheyTrust.com