

## Job Description: Senior Analyst, Private Markets Asset Management

<b>Title:</b>	Senior Analyst, Private Markets Asset Management
<b>Reports to:</b>	Interim - Senior Director, Infrastructure Lead Future - Associate Director, Private Markets Asset Management
<b>Company:</b>	University Pension Plan of Ontario (“UPP” or the “Plan”)
<b>Location:</b>	Toronto, Ontario, Canada
<b>Website:</b>	<a href="http://myupp.ca">myupp.ca</a>

### OUR COMPANY BACKGROUND & CULTURE

UPP is the first pension plan of its kind in Ontario’s university sector, proudly serving over 41,000 members across five universities and fourteen sector organizations. Our purpose is to bring greater retirement peace of mind to the university sector by investing with integrity and serving members with care. As a sector-wide plan designed for growth, our doors are open to all Ontario universities.

Together, we’re a team of progressive thinkers and agile doers operating within a fast-paced culture of collaboration and respect. We believe in bringing smart and capable people together to create, solve, and grow with a clear shared vision and values of integrity, inclusivity, ingenuity, and impact. Our culture is intentionally welcoming and purposefully rooted in equity, diversity, inclusion, and reconciliation (EDI&R). We believe diverse teams, perspectives, and lived experiences contribute to better decisions and a better workplace.

As a pension plan, UPP approaches investing through a long-term lens to generate and safeguard value. Our commitment to investing responsibly accounts for material risks that impact our investment portfolio to generate sufficient risk-adjusted returns to meet the pension needs of our members.

Join us in building a bright future for our members, our organization, and each other.

### THE ROLE

As part of a growing and dynamic investment team, the Senior Analyst, Private Markets Asset Management will play a key role in all areas of the development of UPP’s Private Markets asset management and portfolio monitoring responsibilities. Reporting to the Senior Director, Infrastructure Lead on an interim basis the individual will be responsible in providing high-quality analytical support and expertise to the organization.

This is an exciting opportunity for a driven analyst with a keen eye for detail to join a team of high performing professionals and make a significant impact.

This role is based in downtown Toronto in a hybrid work environment, allowing employees the flexibility to work remotely and in-office (minimum two days per week in-office).

**Note:** The level of this position will be determined based on the candidate’s relevant experience and qualifications; individuals at both the Analyst and Senior Analyst levels are encouraged to apply.

### SPECIFIC ACCOUNTABILITIES

- Assist in active asset management of existing Private Markets investments and provide support in analyzing and evaluating asset management related activities and proposals.
- Participate in meetings and facilitate continuous correspondence with existing investment managers to contribute to the development of relationships.
- Accountable for business-as-usual activities including performance reporting, fee reconciliation, and data integrity, alongside monitoring performance and risk across Private Market investments to support informed portfolio management.
- Assist in preparation of performance reporting for internal and external distribution purposes including regular and ad hoc meetings, investment committee meetings, and annual reporting.
- Facilitate internal collaboration with teams that work closely with the Private Markets team including investment finance and operations, responsible investing, risk management, legal, tax, compliance, treasury, and other teams as applicable.
- Maintenance and development of data and systems related to Private Markets in collaboration with data, analytics, and operations teams
- Prepare forecasting analysis for the Private Markets portfolio.
- Assistance in developing policies, frameworks, and strategy for Private Markets, as applicable.
- Provide analysis, research, and support to all aspects of the Private Markets portfolio.
- Integrate environmental, social and governance (ESG) considerations into the asset management processes and stewardship practices.
- Provide mentorship and guidance to junior team members and interns, as appropriate.
- Contribute to UPP's reputation as a respectful employer, partner, and participant in the financial sector.
- Collaborate with other industry participants to promote a sustainable economy and society.
- Other duties as required.

### SKILLS & EXPERIENCE

- An undergraduate or graduate degree in a relevant discipline.
- Possessing or pursuing an CPA, CBV, MBA, CFA, CAIA or any other relevant professional designation would be an asset.
- Senior Analyst: 3+ years of experience in investment finance or operations, international accounting firms, pension industry, or private markets
- Analyst: Minimum of 1-3 years of experience in investment finance or operations, international accounting firms, pension industry, or private markets
- Able to work in a multi-faceted stakeholder environment and inspire confidence in a broad range of constituencies through a proactive, respectful, and accessible communication style.

### ATTRIBUTES

- High degree of self-motivation and professionalism.
- Ability to prioritize and manage multiple projects in a time sensitive manner.
- Excellent relationship building and conflict resolution skills.
- Demonstrated leadership abilities.
- Excellent interpersonal and verbal communication skills.
- A collaborative approach to understand and respond to organizational needs and partner with various organizational and control functions.
- High degree of professional ethics and integrity.

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- Strong commercial and strategic judgment.
- Alignment with UPP's desire to be a leader in Responsible Investing, ESG, and climate change.

### LIFE AT UPP

**Do work that matters.** We are duty-bound to serve our members' interests, and it's a responsibility we don't take lightly. That's why we've ingrained sustainability in our work from day one—to ensure our members have a resilient future to retire into, both today and for generations to come.

**Stronger together.** Collaboration is how UPP was born, and it's how we work with each other and our partners day in, day out. No one at UPP is just a number (even if they are excellent at math) and every win is a shared win.

**Grow every day.** You'll have the opportunity to work on unique, once-in-a-career projects that maximize your skill set and probably teach you some new ones—at any stage in your career.

**Prioritize wellness.** At UPP, wellness takes many forms. Ultimately, it's about ensuring our people are cared for in the ways that matter to them. Check out some highlights of our inclusive employee-focused benefits program including:

- Defined benefit pension plan
- Flexible hybrid work model
- Work from abroad up to eight weeks/year
- Comprehensive group benefits including medical, dental, vision etc.
- Extended paramedical and mental health service coverage
- Health care and lifestyle spending accounts
- Fertility treatments, paid parental leave, and gender affirmation coverage
- Education Assistance program

***UPP enthusiastically welcomes applications from all qualified applicants and especially invites people with lived experience as an Indigenous person, a person with a disability or as a member of another Human Rights Code protected group that faces barriers to employment to apply. Our goal is to create a barrier-free experience for every candidate throughout the recruitment process, so if you require accommodation at any point during the process, please let us know so that we can make the appropriate arrangements. It would be our honor to work with you to adapt our processes to ensure that you can meaningfully participate.***

UPP respects your privacy. For information on how UPP handles the personal information you provide during the application process, please see our [Job Applicant Privacy Statement](#).