



CornerStone Partners Investment Operations Transaction Specialist

Job Summary

As our Investment Operations Transaction Specialist in Charlottesville, VA making \$65,000 - \$80,000 annually, you will lead the transaction processing initiative at our firm. You will communicate with various parties regarding each of the steps for document completion and investment funding, as well as timelines for all tasks. To thrive in this role, you must have demonstrated work experience where you used Microsoft® Excel and Word to manage time-sensitive, quarterly, monthly or weekly processes that included many different stakeholders and details.

This is a full-time position that includes an annual bonus, generous benefits package, including group health insurance, short- and long-term disability insurance, life insurance, and employer retirement plan contribution. This position requires the candidate to spend a minimum of 2 days per week with team members in CornerStone's Charlottesville office with additional time in the office during the initial training period.

Here is what you can expect on a typical day:

- Work closely with our portfolio managers, clients, and investment managers to complete the necessary documentation for the high volume of investment transactions we complete each week. This may include setting up wires to fund investments.
- Review documents closely for accuracy and completeness. We are SEC regulated. Your attention to detail in your work is critical.
- Track workflow for many different processes including audits, investments, and tax support. You will ensure each time-sensitive step is complete and the next steps have been communicated clearly.
- Use technology and your experience managing processes to maintain our investment manager database and extensive internal online document management system.

Requirements

- Demonstrated work experience managing time-sensitive, reoccurring processes that included many different stakeholders and details.
- Ability to use Microsoft® Office Suite, including Outlook, Word, and Excel to create reports and track processes.
- Ability to effectively communicate highly detailed information to many different internal and external stakeholders, while being thoughtful about grammar and tone.
- We are a highly regulated financial organization and require all employees to complete a pre-employment background investigation.

CornerStone Partners

CornerStone Partners is an outsourced investment office (OCIO) in Charlottesville, Virginia. Our clients are non-profits, foundations, and endowments that rely on the returns generated by their investment

portfolios to fund their missions in health, education, conservation, and building and improving communities. They hire CornerStone to manage their investment program, including full- scale back office operational and administrative support. The firm has 33 employees and is a dynamic, growth- oriented firm committed to developing a diverse and equitable workforce

To Apply

Please submit a resume and cover letter by visiting our Careers page at www.cstonellc.com/careers and click "Apply for Open Positions." Applications will be reviewed as they are received, and we will be conducting interviews until the position is filled. CornerStone is not able to sponsor employees who would require a visa to work in the U.S.

Contact Susan Holtzman, HR Manager, with any questions about the position or to learn more about CornerStone Partners at careers@cstonellc.com.