



FORDHAM UNIVERSITY

THE JESUIT UNIVERSITY OF NEW YORK

Date: 01.22.26

PART-TIME POSITION ANNOUNCEMENT

TITLE OF POSITION/RANK:

Investment Office Student Worker (Analyst)*

*Part-Time/non-benefited; Maximum 19 hours per week

DEPARTMENT:

Finance, Investments

CAMPUS:

Rose Hill or Lincoln Center (willingness to travel to Rose Hill preferred)

LOCATION:

Hybrid – Remote and On-Campus work as required

POSITION SUMMARY:

The Fordham Investment Office seeks a detail-oriented sophomore or junior (second- or third-year undergraduate) for a two-year developmental role supporting the operations and management of the University's endowment. This position offers hands-on experience in institutional investment management, with a focus on performing data reconciliation, maintaining accurate investment records and reviewing performance. The student will play a vital role in the day-to-day operations that facilitate the Investment Office's oversight of the portfolio.

The role is designed as a two-year progression. During the first year, the primary focus will be on the operational fundamentals of the endowment, including data management, organizing investment document and verifying performance figures. While mastering these core skills, the student will also have the opportunity to sit in on investment manager meetings to broaden their industry knowledge. In the second year, the student will apply that foundation to deepen their understanding of asset classes, contribute to investment research/presentations and take on a leadership role by mentoring the first-year analyst.

ESSENTIAL FUNCTIONS:*Investment Document Management*

- Saves and organizes all incoming investment documents into the office's shared OneDrive, including monthly/quarterly account statements, quarterly investor letters, capital call notices, distribution notices, audited financial statements and tax documents (K-1s).
- Ensures all files adhere to the office's standardized naming conventions to facilitate easy retrieval and maintains organizational consistency.
- Maintains a well-organized digital filing system that allows the investment team to quickly access historical documents.

Manager Reporting Workflow & Tracking

- Maintains a comprehensive tracking log to monitor which investment managers have submitted their required monthly and quarterly reporting.
- Ensures the office has documentation for all available portfolio holdings prior to reporting deadlines.

Additional Operational Support

- Assists with data entry into internal Excel-based tracking models and performance databases.
- Supports exposure analysis by uploading select portfolio positions into Bloomberg Terminal when requested.
- Provides ad-hoc research and administrative support for meetings and special projects.

REQUIRED QUALIFICATIONS:

- Currently enrolled undergraduate student in good academic standing.
- Ability to commit to 10-15 hours per week during the academic semester.
- Strong proficiency in Microsoft Excel and Microsoft Office Suite.
- Exceptional attention to detail and organizational skills; ability to maintain accuracy when working with large volumes of financial data.
- Professional communication skills.
- Ability to handle confidential and sensitive financial information with discretion.
- Reliable, self-motivated, and able to work independently, but also as part of a larger team.

PREFERRED QUALIFICATIONS:

- Experience with Bloomberg Terminal

SALARY:

Minimum Salary: \$23.00/Hr.

Maximum Salary: \$23.00/Hr.

NOTE:

Salary is commensurate with experience, qualifications, and skills.

FLSA CATEGORY:

Non-exempt

START DATE:

ASAP

SEND LETTER AND RESUME TO:

nolan@fordham.edu

Fordham University is committed to excellence and welcomes candidates of all backgrounds.

Fordham University is an Equal Opportunity Employer. All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, orientation, gender identity or expression, pregnancy, age, national origin, disability status, genetic information, protected veteran status, or any other characteristic protected by law.