

# Leaders

INTERNATIONAL

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Together  
we are a  
better  
kinder  
stronger  
happier  
richer  
community.



## OPPORTUNITY PROFILE

**Director, Investment Strategy &  
Management**

# Together we thrive.

## About Edmonton Community Foundation

***Our purpose is simple – enriching communities now and for generations.***

The Edmonton Community Foundation (ECF) is committed to building a vibrant city and enriching the lives of all Edmontonians providing of over \$44 million in grants and scholarships each year, thanks to the generous support of more than 2,600 donors. Through our endowment base of more than 1,750 funds contributing to approximately \$1 billion in assets under management, ECF has provided more than \$480 million to the community since 1990.

As the largest non-governmental funder of the charitable sector in our city, ECF is in a unique position to help build a vibrant city, centered on community needs, by working with donors, charities, volunteers, government and community partners. We believe that with the right resources, and with the right people working together, our community can continue to grow and thrive.

To learn more, visit: [Edmonton Community Foundation](#)



## The Opportunity

Reporting to the Vice President, Shared Services, the Director, Investment Strategy & Management is responsible for the strategic oversight and management of ECF's diversified investment portfolios, comprising over \$1 billion in assets under management.

This role plays a critical leadership function supporting the stewardship, long-term growth, and investment strategy of ECF's investment portfolios, working closely with the CEO, VP Shared Services, Investment Committee, external investment managers, consultants, and custodians.

The successful candidate will bring strong investment judgment, strategic insight, and analytical rigour to support asset allocation decisions, portfolio construction, manager selection, and risk management. In addition, this role ensures high-quality governance, reporting, and compliance practices, and provides leadership to the investment team.

The position is based in Edmonton and offers a hybrid work model.

## Key Responsibilities

### **Investment Strategy & Portfolio Oversight**

- Lead the development, implementation, and ongoing refinement of ECF's long-term investment strategy in collaboration with the VP Shared Services, the Investment Committee, and external advisors.
- Provide strategic leadership on asset allocation, portfolio construction, and rebalancing decisions to support sustainable long-term returns. Lead detailed analysis of portfolio performance, manager effectiveness, fees, and risk metrics across all asset classes.
- Monitor market conditions, investment trends, and emerging risks; provide timely insight and recommendations to support informed investment decision-making.
- Conduct quantitative and qualitative due diligence on external investment managers and strategies, including selection, monitoring, and termination.

### **Investment Operations & Reporting**

- Oversee day-to-day investment operations, including cash flow management, capital calls and distributions, transaction processing, and coordination with custodians and managers.
- Ensure the accuracy, integrity, and timeliness of monthly, quarterly, and annual investment performance, compliance, and risk reports.
- Prepare high-quality materials for the Investment Committee, Board, audits, budgeting, and strategic planning.
- Support donor-facing and public investment communications, including performance summaries and disclosures, as required.

### **Governance, Policy & Compliance**

- Lead the development, implementation, and maintenance of investment policies, procedures, and governance frameworks.
- Ensure compliance with ECF's Investment Policies, internal controls, and applicable fiduciary, legal, and regulatory requirements.
- Maintain comprehensive documentation of investment activities, decisions, and processes to support transparency and audit readiness.

## External Relationship Management

- Serve as the primary relationship manager for outsourced investment partners, managers, custodians, and consultants.
- Lead manager onboarding, monitoring, evaluation, and offboarding processes.
- Represent ECF at investor meetings and industry events, maintaining awareness of best practices and market developments.

## Leadership & Organizational Collaboration

- Provide leadership, coaching, and mentorship to investment team members, fostering high performance, accountability, and professional development.
- Collaborate with Finance, Philanthropy, Grants, and other internal teams to align investment activities with organizational priorities.
- Act as a trusted advisor to the CEO and VP Shared Services, contributing to enterprise-wide planning, risk management, and stewardship.

# Qualifications & Requirements

## Education & Experience

The successful candidate will hold a bachelor's degree in Finance, Accounting, Economics, Business Administration, or a related discipline, and will bring a minimum of eight years of progressive experience in institutional investment management, including demonstrated responsibility for team leadership, strategic decision-making, and portfolio oversight. A Chartered Financial Analyst (CFA) designation, or demonstrated progress toward completion, is required. An advanced degree (e.g., MBA) is strongly preferred. Experience working with an Investment Committee within an endowment, foundation, pension, or similar institutional environment will be considered a significant asset.

## Knowledge, Skills & Competencies

**Investment Strategy & Expertise:** Demonstrated depth of expertise in developing and executing institutional investment strategies, including asset allocation, portfolio construction, performance measurement, and risk management across traditional and alternative asset classes.

**Analytical Rigour:** Advanced quantitative and qualitative analysis skills with the ability to synthesize complex data into clear, actionable insight.

**Governance & Fiduciary Leadership:** Extensive knowledge and application of fiduciary responsibilities, investment policy frameworks, and regulatory requirements.

**Strategic Communication & Influence:** Ability to clearly communicate investment strategy, performance, and risk considerations to diverse audiences, including Board and committee members.

**Operational Excellence:** Proven ability to oversee investment operations, reporting systems, and process improvement initiatives with high attention to detail.

**Relationship Management:** Demonstrated success in building trusted, productive relationships with external partners and internal teams.

**Values Alignment:** Commitment to ECF's mission, community impact, equity, inclusion, and responsible stewardship.

## Compensation

A competitive compensation package, including an attractive base salary and excellent benefits, will be provided. Further details will be discussed in a personal interview.

## Express Your Enthusiasm

*Leaders International values diversity, equity, and inclusion in all aspects of our operations. Candidates are invited to contact us directly with any accommodation requests.*

To apply, please email your cover letter and resume (PDF or Word document only—preferably as one document) to **Ardyce Kouri or Jessica Park** at [apply@leadersinternational.com](mailto:apply@leadersinternational.com), indicating the job title in the subject line.

**Leaders International Executive Search**

[www.leadersinternational.com](http://www.leadersinternational.com)