



Tri Sigma National Sorority Investment Team

Tri Sigma is seeking volunteers committed to the long-term growth and prosperity of the financial investments of the organization.

We are seeking 3-5 volunteers to join this team to be responsible for the investment portfolio of Tri Sigma. The purpose of the team is to administer and operate the portfolio. Members of the Investment Team are fiduciaries of the portfolio, with responsibility for overseeing investment policies, general policies, guidelines, investment performance and related risk management.

Qualifications:

- At least two years professional experience in an investment/asset management related field or similar field
- Undergraduate degree or higher obtained in a financial management-related area

Expectations:

- The time commitment is expected to be 5 hours per month.
- Establish Tri Sigma's investment policies and guidelines and review them regularly.
- Authorize and ratify investments to delegated authorities.
- Understand Tri Sigma's investment goals and how they support Tri Sigma's mission.
- Monitor the investment funds' performance, including the impact on Tri Sigma's policies and guidelines.
- Monitor, retain, or replace investment managers and the portfolio's investment funds.
- Interpret investment policies and resolve associated questions about the portfolio.
- Adopt a written Investment Policy Statement that includes one or more benchmark portfolios that serve as a metric to evaluate portfolio returns over several years.
- Supply notices, reports and disclosures as required by laws, regulations, or Tri Sigma policy.
- Review fees incurred by the portfolio to ensure they are reasonable.
- Prepare and file the necessary forms as required by laws and regulations.
- Review the portfolio's audited and unaudited financial statements and other financial reports.
- Maintain records for administering the portfolio and monitoring the actions of the committee.
- Make adjustments and correct inaccuracies in the portfolio as necessary.

- Select, monitor and replace third-party advisors and consultants of the portfolio for effectiveness and appropriateness of responsibilities.
- Stay current with changes in laws and regulations and prepare amendments to the portfolio as required.
- The volunteer term ends when a volunteer chooses to resign, fails to meet expectations, or if the goals of the team are determined to no longer meet the organization's needs.