

Trillium Asset Management
Database Management Associate
April 20, 2018

Trillium Asset Management, LLC is the oldest investment advisor exclusively focused on sustainable and responsible investing (SRI). We believe that environmental, social, and governance (ESG) factors play an integral role in the investment process, which can lower portfolio risk and help identify the best-managed companies.

Job Summary

The Database Management Associate will provide support to the Sales and Marketing team in the Boston office. This position requires someone who is a technology leader, is very organized, has superior attention to detail and can handle multiple responsibilities, and can work both independently and as a team player.

Duties and Responsibilities

- Manage the firm's client and business data. This includes new/closed accounts, firm and product AUM, client type, composite performance, HR stats etc.
- Manage and update all industry, partner databases and platform questionnaires (i.e., eVestment, Morningstar, etc.)
- Interact with the firm's business partners (i.e., consultants) and provide them with periodic performance updates
- Manage firm's master RFP and ensure it is accurate and compliance approved. Partner with internal department liaisons to collect standard RFP responses. This role includes drafting responses to RFP questions, as well as ensuring responses from other departments are complete and compliance approved.
- Provide support services, including troubleshooting performance/return errors, back-up to client records team in new account opening and account reconciliation, and administrative support to the Chief Operating Officer.

Qualifications

- Strong technical skills and working knowledge of portfolio management and trade order management systems (Advent APX and Moxy would be a plus)
- Advanced knowledge of Microsoft Excel
- Strong interpersonal and communication skills. Candidates must be able to effectively communicate verbally and in writing with clients, members of the firm and outside contacts.
- Must have excellent organizational skills and be able to perform multiple tasks concurrently with superior attention to detail.
- Team player, able to work well with all levels of the firm, as well as with clients and outside vendors
- A willingness to work on projects outside of core responsibilities to help the firm achieve goals.

Compensation

Trillium Asset Management LLC provides a generous, compensation package that includes 401(k), profit sharing plan, group life, long-term disability, health, dental, and vision insurance benefits, paid time off and performance-based bonus program.

We will only consider applications with an attached professional resume and cover letter.

Please email: mmcdonough@trilliuminvest.com

Trillium Asset Management, LLC provides equal employment opportunities (EEO) to all employees and applicants for employment without regard to race, color, religion, gender, sexual orientation, gender identity or expression, national origin, age, disability, genetic information, marital status, amnesty, or status as a covered veteran in accordance with applicable federal, state and local laws.