



JOB DESCRIPTION

Updated 5.22.2023

Title: Principal
Supervisor: President
Status: Full Time/Exempt
Salary: \$DOE

FIRM OVERVIEW

McKinley Alaska Private Investment, LLC is a private investment firm located in Anchorage, Alaska. We create value for investors by using our capability, credibility, creativity, capital, and connectivity to source Alaska-relevant investment opportunities and co-invest with best-in-class capital and strategic partners, while aiming to generate returns for our investors.

JOB SUMMARY

The Principal will work closely with the President to develop, fundraise, manage, invest, execute, monitor and report the firm's Alaska-relevant private investment activities. The Principal will work in a highly collaborative manner to manage and mentor the private investment team's analysts and associates, work cooperatively with other McKinley business units, represent the firm with clients, prospects, and in the community, while remaining focused on capturing investment returns for clients. This role is for an experienced investment professional with demonstrated experience sourcing, negotiating, and executing private equity and venture capital investments.

JOB DUTIES

- Work with the President to develop private investment products and offerings, identify investment opportunities, and source Alaska-relevant deals
- Participate in fundraising pitches, due diligence reviews, client and consultant meetings, and industry presentations
- Analyze and assess potential investment opportunities according to the McKinley defined process
- Prepare and present investment recommendations to the investment committee
- Manage the execution, implementation and monitoring of all approved products and investments
- Work closely with third parties involved in the investment process (legal, compliance administrator, ESG, databases, consultants, etc.)

- Maintain data governance and validation procedures for all investments per McKinley policies
- Closely follow all compliance and regulatory requirements as required by McKinley's policies and procedures including content pre-approval and file naming and archiving protocols
- Prepare presentation materials for weekly investment team, investment committee, and Private Investment Advisory Council (PIAC) meetings
- Work closely and collaboratively with McKinley Management resources and shared services including Human Resources, Communications, Legal, Compliance, Finance, and IT.
- Review, provide input, and approve marketing materials and reporting documents.
- Supervise, manage daily workflow, and provide career mentorship to the analysts and associates on the private investment team
- Sit on and provide strategic support to board of directors of investment companies
- Maintain relationships with lenders, brokers, investment bankers and other deal referral sources and other industry and firm partners, contractors, etc.
- Stay informed of industry best practices, current events, and education and networking opportunities
- Recruit other value-added board members, assist with key portfolio company hires, and add value to portfolio companies across multiple dimensions from operations to strategy to growth
- Work closely with President to prepare for exit, sale, recap, and/or other liquidity opportunities
- Represent the firm at community, industry, and client events

KEY CANDIDATE ATTRIBUTES

- You are a naturally optimistic person with a can-do attitude who conducts yourself with professionalism, discretion, and the highest ethical standards
- You live for the deal, and you are in it to win it
- You are a calculated risk taker and can make decisions under pressure
- You are an entrepreneur and are excited by the opportunity to create something tangible from an idea
- You are an evergreen student who is always looking to learn more, know more, and do more
- You are passionate about Alaska, its people, its land, and the opportunities it presents (and willing to invest in the time and energy to put down roots in Alaska)

- You have the ability to take lots of complicated technical information and distill it into easy-to-understand key points
- You are an Excel whiz, math is your second language, and you have extensive financial/business modeling and analysis skills
- You know how to manage your own and other people's workload to get the job done on time and 100% accurate
- It's important to you to take the time to help junior staff develop their careers and you're willing to invest in their success
- You are a team player who respects the skill sets of others and value people who add expertise that makes our team better

KEY CANDIDATE QUALIFICATIONS

- Bachelor's degree and at least 5-10 years of directly relevant professional experience required
- Master's degree in Business Administration/related field preferred
- Advanced professional designation (e.g., CFA, CAIA) is a plus
- Extensive knowledge of private equity, venture capital, alternatives, hedge funds, transaction execution (M&A), portfolio management, and/or business strategy required
- High level proficiency in mathematics and financial modeling
- Ability to perform, apply and leverage cash flow, valuation, and capital structure analysis
- Must be able to understand and synthesize common scientific and technical journals, financial reports, and legal documents
- Effective presentation, advanced critical thinking, and superlative writing skills
- Proficiency in Excel, Word, and PowerPoint, with strong general technological skills
- Previous experience supervising staff and leading a team
- Ability to travel, including internationally, for business-related activities
- Ability to work outside of traditional business hours

McKinley Management, LLC is a privately held, global investment, lending, and research firm based in Anchorage, Alaska, with offices in Juneau and Chicago. Its four business units McKinley Capital Management, McKinley Alaska Private Investment, McKinley Research Group and McKinley Alaska Growth Capital (Alaska Growth Capital BIDCO, Inc.) work together to provide clients integrated services umbrellaed under one company.

BENEFITS

McKinley Management is a people-first organization committed to providing a best-places to work environment. We aim to provide compensation packages that meet or exceed industry standards. Our benefits package includes traditional employee benefits such as the option for health, dental, vision, disability and life insurance, paid leave and holidays, a paid volunteer day, 401k matching, charitable matching, education reimbursement, and milestone anniversary bonuses. We have a flexible workplace policy for many positions with the ability to work remotely up to three days per week.

PHYSICAL DEMANDS

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. While performing the duties of this job, the employee is occasionally required to stand; walk; sit for long periods; use hands to finger, handle, or feel objects, tools or controls; reach with hands and arms; climb stairs; balance; stoop, kneel, crouch or crawl, talk or hear. The employee must occasionally lift and/or move up to 50 pounds. Specific vision abilities required by the job include close vision, distance vision, color vision, peripheral vision, depth perception, and the ability to adjust focus.

WORK ENVIRONMENT

Work environment characteristics described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. The noise level in the work environment is usually moderate. The above statements describe the general nature and level of work being performed by individuals assigned to this classification. This is not intended to be an exhaustive list of all responsibilities and duties required of personnel so classified.

DISCLOSURE

This job description is not a legal document and in no way states or implies that these are the only duties to be performed by the employee occupying this position. The incumbent is expected to perform other duties necessary for the effective operation of the department. Any qualifications to be considered as equivalents in lieu of stated minimums require prior approval of Human Resources.