



DC Consultant
Defined Contribution Group
November 2014

Founded in 1973, Callan is one of the largest independently-owned investment consulting firms in the United States. Headquartered in San Francisco, with offices across the country, we provide research, education, decision support, and advice to a broad range of institutional investors, collectively responsible for nearly \$2 trillion in total assets.

As an employee-owned firm, we pride ourselves on our ability to attract and retain the brightest investment professionals in our industry. In a business that is critically dependent on the tenure of its people, our average consultant has been with the firm for over 10 years. This stability creates the perspective and the experience that make us a recognized leader in our industry.

Our experienced consultants are supported by one of the strongest centralized manager research and performance measurement efforts in the industry. We employ over 60 dedicated research, database, and performance measurement professionals, and have over 30 CFA designations across the firm. Combine this with our proprietary systems built over our 41 years in the business, and no other firm is better positioned to serve the needs of today's institutional investors.

Role

DC Consultant in Callan's Defined Contribution Group

Job Responsibilities

- Conducting DC plan recordkeeper searches, in both a support and lead capacity
- Conducting other DC-related provider searches (e.g., managed account provider, self-directed window provider, company stock fiduciary, etc.)
- Analyzing the administrative fees and services for DC plans as well as for DC investment option fees
- Developing and maintaining relationships with the major recordkeeper firms in the DC arena
- Researching special DC topics for Callan clients and consultants
- Keeping up-to-date on the general DC and administration environment
- Representing Callan's defined contribution capabilities with clients
- Supporting the development of new DC business through presentations and meetings

Skills

- Familiarity and experience with defined contribution plan structure, administration, and investments
- Client facing experience, and comfort with articulating information about defined contribution services
- Strong familiarity with DC recordkeeping landscape
- Investment knowledge and background preferred
- Strong combination of presentation skills and research/analytical skills
- Familiarity and comfort with conducting and leading fee analyses and recordkeeper searches
- Computer and technical skills
- Strong communication skills
- Must work independently and as part of a close team
- Proactive, resourceful, and results-oriented
- Willing to travel
- Strong knowledge with Microsoft Windows and programs (primarily MS Word, MS Excel, and MS PowerPoint)

Education

- Minimum of 5 years of experience in the Defined Contribution space or related field
- Bachelor's Degree required
- Graduate Degree preferred

The location of this position is in our Chicago office; however, there may be some flexibility in the location of this position: New Jersey, San Francisco, Denver, Atlanta.

Callan Associates Inc. is an Equal Opportunity Employer, M/F/D/V.

Please e-mail a cover letter and resume to:

Callan Associates Inc.

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