

Third Quarter 2022

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Position Title: Investment Associate

Employer: Monument Square Investment Group, LLC

Location: Beverly Hills, CA

Position Type: Full-Time

**About MSIG:** Monument Square Investment Group ("MSIG") is a Beverly Hills, CA-based privately held alternative manager focused on making direct opportunistic U.S. real estate investments in the middle and lower-middle markets. MSIG's thematic investment approach is premised on identifying dislocations, acquiring assets that MSIG believes are undervalued by the capital markets and developing and/or repositioning these assets to generate significant yield enhancement relative to prevailing cap rates. MSIG leverages its unique investment theses and diverse network of long-term, strategic relationships to create joint ventures with best-in-class sponsors, aiming to consistently generate alpha throughout market cycles. MSIG manages commingled investment funds and separately managed accounts on behalf of its investors.

**Opportunity:** As an Investment Associate, you will work directly with the firm's investment team Partners and play a central role in the firm's investment process. Your primary responsibilities will be centered around working with the Investment team, building complex financial models, analyzing market data to hone assumptions, and assisting with the compilation and presentation of investment committee memos. You will be involved in sourcing and maintain relationships with commercial real estate sponsors and capital markets firms. You will gain significant exposure and be expected to become highly knowledgeable across asset classes, markets, business plans, and capital structures. Your role and expectations will be clearly defined; however, you will be encouraged to think critically and creatively and suggest concepts that will create value across any aspect of our firm and its stakeholders.

**Experience and Qualifications:**

- Undergraduate degree in Real Estate, Finance, Accounting, or another related field;
- 3+ years Investment Banking, Private Equity or Commercial Real Estate Investment experience is preferred;
- Exceptionally strong work-ethic with a highly detail-orientated mindset and work product;
- Ability to efficiently and effectively communicate with both internal and external firm stakeholders;
- Highly proficient in Microsoft Excel. Proficiency in Microsoft Power Point strongly preferred; and
- Ability to create complex real estate pro formas (both acquisition and development) and investment memos.

**Duties:**

- Perform complex financial analysis and underwriting in MS Excel, including sensitivity analysis, from the earliest stages of the investment and capitalization process to the very final steps;
- Work with other members of the Investment team on writing, compiling, and supporting the most pertinent aspects of every deal on each Investment Committee Memo to be presented to the Investment Committee;
- Compile and analyze a broad range of market data in a dynamic and detail-oriented format. Articulate corresponding thoughts and conclusions precisely and succinctly both verbally and in writing;

- Compile key performance and operating metrics on a historical basis through internal and third-party data sources across various asset classes;
- Assist with facilitating outreach to and managing relationships with commercial real estate sponsors, capital markets firms, and other relevant third parties;
- Analyze and evaluate existing portfolio investments, determining performance variance relative to original proforma underwriting and identifying causality;
- Assist the team in the preparation of investment reports, presentations, and marketing decks; and
- Work in a cross-functional capacity with other departments of the firm including Asset Management, Accounting, and Investor Relations.

Compensation & Benefits:

- Industry Competitive Salary
- Industry Competitive Bonus (experience depended)
- Comprehensive benefits package including medical and vision
- Unlimited PTO (approval required by direct report)

Contact for Application:

To apply for this position, please submit your resume and a cover letter to:

Matthew B. Doherty  
Managing Director, Investments  
[info@monumentsqr.com](mailto:info@monumentsqr.com)