



Aon is looking for a Fiduciary Services Consultant

The Fiduciary Services Consulting Practice (FS) is viewed as a differentiator for Aon Investment Consulting. The FS practice provides services beyond traditional investment consulting; including fiduciary reviews, fiduciary training, governance training and consulting, policy and process review and documentation, strategic planning, board/committee self-assessments, and a wide variety of governance advice designed to support decision makers of public and corporate funds, endowments and foundations.

Job Responsibilities:

- Serve as the internal contact regarding FS work and general information
- Serve as project coordinator for fiduciary reviews, including logging and distributing documents need to perform FS work, scheduling meetings and interviews with clients, and internal colleges
- Assist with tracking all current projects, prior projects, and requests for advice/assistance
- Conduct in person and telephone interviews with board members and staff as necessary
- Compile document request lists for clients based on the scope of work of fiduciary reviews and other works, and record the documents received
- Research public and corporate pension and endowments and foundations regarding applicable laws, governance practices, staffing structures, and investment and benefits related matters
- Draft, or assist marketing with drafting, responses to RFP, including responses to RFP questions, drafting mythology to address project scope of work, updating colleague bios and references
- Draft contracts and estimate fees and work with Legal and Compliance to obtain approval
- Promptly respond to client emails and voicemail,
- Attend client meetings as needed
- Review invoices and track FS revenue and profitability
- Be familiar with team calendar to coordinate various internal and client meetings
- Prepare and submit documents for KYC process
- Read various articles and update the team on any relevant news, including any organizational changes to potential and current clients and competitor firms

Accountabilities:

- Outstanding analytical skills
- Accuracy and attention to detail
- Basic understanding of fiduciary responsibility, and governance common and best practices
- Excellent writing, research, and communication skills
- Proven project management skills

Qualifications:

- Bachelor's degree in relevant area (e.g., business, finance, economics)
- Advanced degree and / or JD, CFA and / or CEBS credential(s) highly desired
- Minimum of 3- 5 years of progressive experience in consulting, primarily in the areas of board and/or committee governance and fiduciary responsibility
- Ability to travel frequently

To apply, click on the link below:

[Fiduciary Services Consultant](#)