

AMELIA FAIRBANKS

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📍 Kansas City, MO
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SKILLS

- Manager Research
- Due Diligence
- Asset Allocation
- Fee Benchmarking
- Investment Policy
- Microsoft Excel
- PowerPoint
- Attention to Detail
- Organizational Skills

CERTIFICATES

Chartered Financial Analyst (CFA)

CFA Institute • 09/2023

Chartered Alternative Investment Analyst (CAIA)

CAIA Association • 06/2024

SUMMARY

Senior Investment Analyst with 8 years in manager research and asset allocation for retirement and pension clients in Kansas City. Leads due diligence on public and private managers, builds asset-liability models in Microsoft Excel, and presents recommendations in PowerPoint to 15 public and corporate pension plans.

EXPERIENCE

Senior Investment Analyst

Prairie Fountain Consulting Group • Kansas City, MO
04/2023 - Present

Investment consultant advising 15 pension plans with \$28B in assets.

- Lead due diligence on **40** managers a year across equity, fixed income and real assets.
- Build asset-liability models for 15 pension plans and recommend asset allocation targets to their boards.
- Present quarterly performance reviews in PowerPoint to 6 client boards.
- Review the work of 3 analysts on performance reports, fee audits and manager searches.

Investment Analyst

Heartland Retirement Advisors • Overland Park, KS
06/2019 - 03/2023

Retirement plan consultant for 300 401(k) plans.

- Scored **250** mutual funds and collective trusts each quarter against an investment policy checklist.
- Ran 14 manager searches that replaced underperforming funds for plan sponsors.
- Built fee benchmarking in Microsoft Excel that saved clients \$2.6M in annual fees.
- Wrote 120 fund watch-list memos for quarterly investment committee meetings.

Investment Operations Analyst

Plaza Bank & Trust • Kansas City, MO • 06/2018 - 05/2019
Community bank trust department with \$1.1B in assets.

- Reconciled **600** trust accounts against custodian records each month.
- Processed 150 trades a week for trust officers and fixed 98% of breaks the same day.
- Built an Excel tracker for 80 required minimum distributions due each year.

EDUCATION

Bachelor of Science in Business

University of Kansas • Lawrence, KS • 05/2018
Finance