

***This is only a **preview** of the exam statements for the Training & Experience Evaluation. Taking this online examination will require you to respond to each statement indicating how your training and experience relate to each. **To take the actual examination**, please refer back to the bulletin and click the link at the bottom of the bulletin.

CalPERS Training and Experience Evaluation Investment Manager, PERS

The California civil service selection system is merit-based and eligibility for appointment is established through a formal examination process. This examination consists of a Training and Experience evaluation used to evaluate your training and experience relevant to the position.

This Training and Experience evaluation is a scored component accounting for 100% of your rating in the examination process. It is important to complete the questionnaire carefully and accurately. Your responses may be verified before appointment to a position.

Number of Questions: 1 – 8

To answer all the test items in this exam, you will be required to choose from among the provided answers, and to enter (type in) specific information about your experience and formal training you have completed.

Be prepared to give specific information about the length and breadth of your work experience.

Instructions:

Rate your experience performing specific job-related tasks.

Respond to each of the following statements by indicating how the statement applies to you. You are required to respond to every question and provide relevant examples.

In responding to each statement, you may refer to your **WORK EXPERIENCE**, whether paid or volunteer, and/or **FORMAL TRAINING COURSES** you have completed.

PLEASE NOTE: This examination is designed to gain an overall assessment of your training, and experience as it directly relates to the duties, knowledge, and abilities required for this position. All components of this examination have been carefully validated by tying them directly to job requirements and documenting their relevance to the position.

Tasks for Investment Manager, PERS

1. Directing analyses involving development and implementation of operational or investment risk management and/or investment program strategies.
2. Conducting analyses of investment alternatives, terms and conditions, and/or adherence to policies and procedures to meet organizational objectives.
3. Monitoring existing investments, portfolio compliance, or operational risks in order to meet organizational objectives.
4. Recommending or executing investment transactions to meet organizational objectives consistent with policies and procedures.
5. Evaluating investment performance, risks, processes, controls, or systems, to ensure adherence to the organization's objectives, policies, and procedures.
6. Communicating information to staff and management for investment and/or operational decisions.
7. Supervising staff performing investment related duties to ensure adherence to the organization's policies and procedures.
8. Developing and implementing new programs, strategies, policies, processes, and/or systems, to meet organizational investment objectives.