



## Investment Research Internship Summer 2023

### Firm Summary

SouthernSun Asset Management, established in 1989, is a research-driven investment management firm implementing U.S. Small Cap Equity and SMID Cap Equity investment strategies. We manage assets for high net-worth clients, public pensions, unions, nonprofits, and corporations.

We believe our greatest assets are our people, so we believe that excellence in execution and a healthy organization are inextricably linked. Our firm seeks to attain superior long-term returns for our clients, outstanding client support, seamless error-free operations, a culture of compliance, and a healthy and inclusive work environment for our employees. Additionally, we are actively engaged, individually and corporately, in the Memphis community—working to help our city thrive. Our goal is a healthy and inclusive work environment for our employees. We want our employees to be lockstep in their desire for SouthernSun to excel as an investment management firm.

Therefore, we adhere to the following Core Values:

- *Entrepreneurial*: We foster initiative, strive to be thoughtfully adaptive, and take calculated risks while continuously improving within our boutique environment.
- *Problem Solving*: We use our analytical skills combined with the commonsense intuition of “generalists” for decision making throughout the organization.
- *Relational*: We believe in the value of building relationships that are intentional and lead to positive, healthy, and respectful interactions.
- *Community Centric*: We are mindful that we are part of a larger community, and we work to be a good neighbor.

SouthernSun is overseen by a Management Team that sets strategic direction for the firm. In addition, the Management Team seeks to provide clarity by building trust, resolving conflict, achieving commitment, requiring accountability, and driving results. We strive to accomplish our objectives and strategic direction by establishing specific goals for each team, focusing on professional development, providing appropriate incentives, and making diversity/inclusion an important aspect of our firm. In addition, we have community centric activities to educate and engage our employee base as well as opportunities for wellness and healthy living. Finally, we review each employee’s results in several areas throughout the year and then via a self-assessment at each year-end.

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## Job Description

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The Internship will involve three major components— shadowing current employees within each functional area of the firm, a company or industry related project to be completed and presented to the Management Team at the end of the internship, and engagement with Memphis’s non-profit sector. The ideal candidate will thrive in a fast-paced environment and will be able to manage many different tasks. This position will provide the individual an opportunity to gain experience and be exposed to all areas of the firm, allowing them to understand how each department works together to accomplish the firm’s overall goals. The project and the community-centric aspects are important parts of the Internship as well. This 8-week project will provide the Intern with an opportunity for investment-related research as well as an opportunity to present the project's findings to the SouthernSun Management Team. The community-centric focus will afford the Intern insight through an experience with Memphis's non-profit sector. Finally, each Intern will be assigned a mentor from the firm’s employee base to assist with the Intern’s acclimation during their time at SouthernSun.

## Compensation and Dates

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8 weeks (June 5 – July 28, 2023)

\$7,000 total comp paid at regular firm payroll intervals

## Requirements

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- Minority or Women Candidates strongly encouraged
- Undergraduate and focused on business degree or related path
- Previous experience or interest demonstrated on investment topics or research
- Intermediate knowledge/experience with Microsoft Office Suite required
- Problem solving abilities
- Detail-oriented, organized, and committed to excellent work-product
- Ability to work unsupervised and complete projects with (at times) limited oversight
- Good communication skills, both written and verbal
- Supportive, reliable, and flexible

## Activities

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The Internship has 3 components:

- Direct engagement, training, and workflows related to each of our functional areas, including
  - Investment Team
  - Operations/Trading Team
  - Compliance Team
  - Client Relations Business Development Team
- Project Related Aspect: to be defined and explained further during the interview process; examples include research/analysis on company specific topics, industry analysis on our portfolio companies and competitors, or performance analysis of competitors over various time periods.
- Community Centric Program: time spent on-site with various non-profits in Memphis.

Qualified applicants should submit their resume to [career@southernSun.com](mailto:career@southernSun.com).