

# One-Page Fit Memo — PSP External Manager Selection & Monitoring

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## Why PSP External Manager Team

- Blend of qualitative and quantitative diligence aligns with my memo-first approach and modeling background.
- Excited to contribute to a global platform with rigorous governance and long-term partnerships.
- Opportunity to leverage automation and data tracking to keep manager monitoring proactive and timely.

## Relevant Experience & Impact

- **Independent Builder:** created manager evaluation frameworks combining qualitative scoring, factor exposures, and operational due diligence; automated monitoring dashboards.
- **Rosen Capital Advisors:** assessed co-investments and fund commitments, drafting IC-ready materials covering strategy fit, risk, and performance.
- **Private Equity Analyst:** produced diligence memos for \$350M–\$3.5B allocations, highlighting manager track records, processes, and risk mitigations.

## How I Work

- Start with structured templates that capture both narrative insights and data-driven metrics.
- Maintain clear audit trails for decisions, including meeting notes, reference checks, and quantitative analyses.
- Communicate findings in concise memos tailored to investment committee expectations.

## Capabilities Snapshot

- Manager research, performance analytics, risk assessment, guideline monitoring, qualitative diligence.
- Excel, Python, SQL, document automation tools; strong writing and presentation skills.
- Relationship management, stakeholder coordination, disciplined follow-up cadence.

## **Availability**

Ready to relocate to Montréal and contribute immediately to PSP's external manager selection and monitoring processes.