

Job Opportunity Posting: Investment Analyst

Position Summary

This position will assist the Director of Investments with all phases of portfolio management, with an emphasis on communicating investment topics to clients and prospective clients through written analysis and verbal communication. Other functions include entering securities trades, monitoring security positions, monitoring asset allocations, gathering economic and capital markets information (both equity and fixed income data), participate in asset allocation strategy development, monitor and initiate asset allocation rebalancing, strategic and tactical asset allocation changes, monitoring asset class, sub-asset classes, and securities.

Scope & Breadth of Position

This position reports to the Director, Investments & Portfolio Management Services and has no direct reports.

Essential Job Accountabilities

Monitoring, maintenance, documentation, execution and compliance with all regulatory requirements associated with Trust Department portfolio management, securities trading, and portfolio recordkeeping.

Relationships

Will work in a team setting and participate with Financial Planners and Trust Officer to deliver high-quality service to clients.

Experience and Job-Related Requirements

- Bachelor's Degree required, one of the following fields of study preferred:
 - Economics
 - Finance
 - Business Administration
 - Accounting
- Preferred 3-7 years' experience in financial services, securities processing, or previous experience in portfolio management.
- Preferably hold or working toward obtaining an industry certification such as:
 - Chartered Financial Analyst, CFA
 - Certified Financial Planner, CFP®
 - Certified Investment Management Analysts, CIMA
- Familiarity with macro-economics, capital markets, and investment management preferred.
- An interest in values-based/ ESG investing or impact investing is preferred.
- An ability and interest in interacting with clients, presenting, and building relationships is preferred. An ability and interest in communicating complex financial topics to clients in easy-to-understand ways is preferred.
- An ability and interest in building and maintaining advanced quantitative models and reporting in Microsoft Excel and other systems is preferred.

Physical Requirements

- Ability to communicate orally with management and co-workers, both individually and in a group/team.
- No heavy lifting is expected. Exertion of up to 10 pounds of force occasionally may be required.

- Regular use of the telephone and e-mail for communication is essential.
- Sitting for extended periods is common with extensive work at a computer monitor and/or calculator.
- Hearing and vision within normal ranges is essential for normal conversations to receive ordinary information and to prepare or inspect documents.
- Good manual dexterity for the use of common office equipment such as computer terminals, calculator, telephone, and copiers.

Work Environment

- Job is performed indoors in a traditional office setting.
- Expect the work environment to change after an appropriate period of growth and experience to include air travel at a level of up to 10% of time.

Forward resume to Yveshia Klingman
Yveshia.Klingman@presbyterianfoundation.org
Attn: HR Posting #23-7-02

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