

**JOB DESCRIPTION**

<b>Position Title:</b>	Equity Research Analyst
<b>Department:</b>	Equity Research
<b>FLSA Class:</b>	Exempt-Administrative
<b>Job Type:</b>	Full Time
<b>Standard Week:</b>	40+ Hours Per Week
<b>Report To:</b>	Chief Executive Officer & Senior Vice President

**Job Summary:** The Equity Research Analyst will be a member of a Research Team for a balanced investment manager, which is currently managing over \$1 billion in stocks and bonds. As a member of the Firm's Investment Committee, the responsibilities will include researching and developing new equity ideas based on advanced analytics and preparing proposals to be presented to the Committee; participating in equity trading activity discussions; participate in asset allocation decisions; provide expertise to the Investment Committee regarding research, macroeconomics impact, and sector trends that may impact client investments; assist the Trading Department with research as needed; and support the Advisors and other members of client services with client investment needs and client communications as appropriate.

**Job Duties**

Develop expertise of sectors that are current areas of focus for the Firm, including healthcare, technology, utilities, infrastructure, foreign and value stocks

Develop, research, and present to the Investment Committee, new equity ideas that align with the Firm's balanced investment philosophy.

Serve as a member of the Investment Committee and actively participate in buy, sell, and hold discussions, including price points and the size of the buy/sell recommendations.

The research process includes relative and intrinsic (DCF) analysis within a spreadsheet that is automatically filled by Bloomberg, as well as speaking directly with company representatives and possibly others in the specific industry.

Provide expertise to the Investment Committee on numerous areas of investment research, including macroeconomics effects and sector trends that may affect stocks, bonds, currencies, commodities, and any other area in which a client may have a concern.

Develop blog content and assist with quarterly newsletters and other client communications.

Participate with asset allocation decisions, including cash levels, equity and bond exposure, and any unique bond strategies.

Assist the Trading Department with bond research as needed, especially the U.S. municipal market.

Learn and assist with the portfolio management process, which is unique for every client and balanced between individual stocks and bonds, no derivatives.

Develop and maintain relationships of support with the Firm's client relationship managers, and the other members of client services to assist with client investment needs.

Provide ongoing communication between the Investment Committee and the Firm's client relationship managers and the other members of client services.

**Required Qualifications:**

- Bachelor's Degree with a concentration in Finance or Investment.
- MBA from a top Business School and a path towards a professional designation (CFA® or CFP®) is preferred.
- CFA® Charter Member is strongly preferred.
- Must have 2-5 years of equity research experience.
- Experience in personal security trading, equity, and/or bond analysis.
- Prior experience working with Bloomberg and other research systems is strongly preferred.
- Position requires an awareness of market moving news and stock specific news; the ability to complete a detailed analysis of business strategy, valuation, and financial statement analysis; and experience interacting with investor relations for all financial securities.
- Attention to detail, follow-up on actions, and a sense of urgency.
- Professionalism in all facets of the job is a must, commitment to the highest level of ethics is essential.
- Must be able to demonstrate the ability to work with industry focused information systems and applications.
- Must have strong interpersonal skills; able to communicate effectively, verbally and in writing; and have a demonstrated track-record of performing in a team-based, collaborative work environment.
- Successful candidates must be able to work directly with team members and other departments in the Firm who provide support, advice, and assistance in the management of clients' accounts.

**Equipment, Software and Materials Used:**

- Microsoft Office Suite (Outlook, Word, Excel, PowerPoint)
- Bloomberg (Research System and Equipment)
- Internet Search Engines (Edge, Chrome, Explorer)

**Hiring Range:**

- \$80,000 - \$110,000 + performance based incentives