



Investment Analyst Position

Our Firm

Sandy Cove Advisors is a South Shore based boutique wealth advisory firm with a growing business. We are a progressive and innovative firm working with a very select group of clients. We are all about building a cohesive team and are looking to add another investment-focused colleague to our firm.

Position Summary

We are looking for an Investment Analyst to work alongside the Chief Investment Officer of the firm and provide support in numerous areas including financial markets, trading, asset allocation, fund due-diligence, and client service.

Our ideal candidate would be adept at producing manager research reports, preparing client-facing materials, managing trade reports and reconciliation, preparing and monitoring Morningstar reports and portfolio feeds, and providing support on various investment projects.

You are passionate about financial markets and seeking a role where you can actively participate in many facets of investment work and learn side-by-side from seasoned professionals. Due to the complex nature of clients' investment objectives and related service needs, the Investment Analyst must be well versed in a broad range of investment disciplines and strategies. The position requires a high level of investment acumen and critical thinking in addition to the utmost of discretion.

Responsibilities:

- Assure that client portfolios are aligned and constructed with stated objectives.
- Participate in portfolio management activities for clients; each subject to the customized investment needs of the client. Services include, but are not limited to, asset allocation monitoring, trading and trade rebalancing, analysis and review of equity & fixed income investment strategies, preparation of client investment review materials.
- Ensure that CIO has adequate information to perform daily portfolio management duties (trade reconciliation, Morningstar downloads, daily cash report, new account openings)
- Assist in the management of all aspects of client relationships, including communication, trading and coordination between Sandy Cove team and the client.

Job Requirements & Qualifications:

Successful candidates are driven to proactively support the CIO. They possess exceptional organizational skills and attention to detail, are able to operate independently with a high level of direct responsibility. The Investment Analyst is highly professional and unconditionally dedicated to delivering a first-class experience to clients.

Qualifications for the Investment Analyst position include:

- 1-4 years of investment/financial markets experience preferred
- Strong quantitative, analytical, and interpersonal skills
- Bachelor's degree in Finance, Economics, Business Administration, Accounting or related subject
- Ability to multi-task and establish priorities
- Ability to handle confidential material with utmost discretion
- A passion for financial markets
- Progress towards or completion of CFP, MBA, and/or CFA preferred
- Highly proficient in PowerPoint and Excel

For more information, please contact:

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