



SIMON QUICK

ADVISORS

Job Title: Research Analyst
Location: Morristown, New Jersey

About Simon Quick Advisors

Simon Quick Advisors is a wealth management and investment consulting firm that advises high net worth individuals and families. Simon Quick Advisors is an independent registered investment advisor (RIA) offering customized integrated financial planning and investment solutions. The firm has offices in Morristown, NJ, New York, NY, and Los Angeles, CA, Chattanooga, TN and Denver, CO.

Why Work at Simon Quick Advisors?

Simon Quick Advisors' culture and company philosophy are founded on a set of fundamental values that influence the choices we make and the actions we take. Our core values encompass integrity & honesty, mutual trust & respect, ownership & accountability, and humility. We provide opportunity, nurture talent, develop our people and reward achievement. You will be joining a culture that promotes functional excellence and teamwork, a passion for learning, and values employee input to help shape the future of the firm.

The Investment Research Team

The research team serves as the market analysis and investment idea generation engine of the firm. We source and diligence potential opportunities that may benefit our client portfolios, and monitor and adjust existing investments. Our investment universe spans traditional equity and fixed income strategies, as well as hedge funds and private equity.

The Opportunity

The role we're looking to fill should be considered initially as an apprenticeship, working alongside senior members of the team to fulfill market research and investment and operational due diligence responsibilities, while learning and building a core competency in investment manager due diligence. The analyst will be a generalist across asset classes and will be fully involved, with commensurate responsibilities, in manager meetings, analysis and reporting, team and firm wide education, as well as client presentations and communication.

The long-term objective of the position is to become a senior investment professional that can work independently at a high capacity across these responsibilities, who's insights and analyses are respected and sought after across the firm and client base.

The successful candidate and long-term employee appreciates the value of a rigorous investment process as much as they enjoy following market headlines. This individual will have the intellectual curiosity to seek out attractive investment opportunities, a passion for understanding the risks and potential rewards underlying them, the confidence to deliver their findings and recommendations, and the humility to admit when they're wrong and adapt.

Duties & Responsibilities

- Analyst will be responsible for coverage of a list of active investments across asset types and investment strategies, and will serve as the firm's point of contact with those managers.
- Actively monitor and disseminate performance and related market news of covered managers and relevant strategies.
- Identify performance drivers and portfolio risks on an ongoing basis.
- Understand investment processes, operations, and structures of investment managers.
- Utilize proprietary research technology to facilitate ongoing qualitative and quantitative due diligence of diverse investment strategies.
- Regularly participate in manager meetings and maintain detailed notes.
- Prepare meeting agendas and supporting materials, and be an active participant in Investment Committee, Strategy, and Team meetings.
- Develop relationships with industry contacts to facilitate due diligence on both current and new investment opportunities.
- As the analyst develops, they will be source and evaluate potential new investment opportunities; the analyst is frequently tasked with taking the lead in evaluating new opportunities with the support of the broader team.
- Frequently liaise with client service team to provide regular updates on portfolio investments in advance of client/prospect meetings.

Professional Leadership

- Help to foster a positive atmosphere within their team, throughout the office, their investment relationships, and with clients.
- Encourage teamwork and a collaborative spirit among colleagues.
- Represent professional behavior and etiquette at all times.
- Demonstrate a desire to develop professionally and personally.
- Stay current and knowledgeable of changing industry initiatives and market conditions.

Qualifications

- Bachelor's degree with a GPA greater than 3.0.
- 0-2 years of relevant experience.
- Strong interest in financial markets, economics, and the investment industry.
- Strong organizational, time management, and written/oral communication skills.
- Process-driven and proactive with excellent problem solving and analytical skills.
- Strong attention to detail.
- Ability to manage multiple tasks while meeting deadlines.
- Experience with Microsoft Office, particularly Excel and Powerpoint.

Salary & Benefits

- Salary and bonus are competitive based on industry standards and experience level.
- Benefits include dental, vision, health care, and 401(k) discretionary profit sharing company match.
- Financial support for professional accreditation and continuing education requirements.
- Transparent open-door culture and friendly working environment.
- Every employee is provided with a dedicated mentor and career path guidance.

Application Process

To apply, please submit a cover letter and resume to jobs@simonquickadvisors.com and complete the online application at www.simonquickadvisors.com/careers.

Simon Quick Advisors, LLC is an Equal Opportunity Employer and we do not discriminate against any employee or applicant for employment because of race, color, sex, age, national origin, religion, sexual orientation, gender identity, status as a veteran, and basis of disability or any other federal, state or local protected class.