



## **JOB DESCRIPTION – INVESTMENT ANALYST**

### **Overview:**

FAI Wealth Management, a successful Fee-Only Registered Investment Advisory Firm located in Columbia, Maryland, is actively searching for a highly motivated individual to join their professional team as an Investment Analyst. You will report directly to the Chief Investment Officer and work closely with team members, providing research and reports. More specifically, you will:

- Research possible investments, including Mutual Funds, ETFs, and individual stocks.
- Build and maintain Excel spreadsheets used in the investment research and investment decision process
- Download and maintain company financial statements in Excel
- Update monthly and quarterly portfolios in Excel and other software packages
- Write quarterly reviews of Mutual Fund holdings
- Provide support to Advisors and the Chief Investment Officer with ad hoc report requests from software programs such as F1360, Hidden Levers, Factset, Morningstar, etc.
- Organize and distribute all information for internal weekly, monthly, and quarterly investment meetings

### **Qualifications:**

- Undergraduate degree in Accounting, Finance, or Business
- 0-5 years of work experience
- Strong quantitative and computer skills
- Strong Excel skills including statistics and macros
- Able to meet hard deadlines
- Attention to detail and accuracy of work are required
- Strong ability to multitask
- Solid understanding of equity and bond markets
- Progress towards a CFA designation and/or MBA a plus
- Must be able to work independently and within a team

### **Benefits:**

- Competitive compensation depending on experience
- Health benefits
- A bonus program
- A 401(K) retirement plan
- A fun and friendly team of colleagues

Please forward resume and salary requirements to [HR@faiwealth.com](mailto:HR@faiwealth.com). Applications without salary requirements or salary history will not be considered.

## **FAI WEALTH MANAGEMENT**

Established in 1987, FAI Wealth Management, located in Columbia, MD, has been focused on combining strategic investment thinking with highly personalized financial planning. FAI assists families impacted by significant financial events such as changing careers, preparing for the sale of a business, planning for retirement, facing divorce, the death of a spouse or stock option deadlines. Our esteemed team of fee-only professionals has a combined 100+ years of experience in financial planning, investment analysis and wealth management.