Porter, White & Company

Research Analyst/Financial Analyst

July 2024

I. About the Job

The Research Analyst is a financial analyst focusing on financial research and portfolio theory. This position supports the firm's investment management business by researching academic literature in the areas of finance and economics, utilizing historical and simulation analyses as well as portfolio optimization tools to find the most appropriate asset allocation for clients. The skill set of the Research Analyst includes the ability to research, interpret and assimilate large amounts of information into clear and concise communications. Over time, the candidate would need to obtain a CFA designation, CFP designation and Series 65 license. Candidates should possess strong analytical and writing skills, close attention to detail and capacity to learn financial concepts and interpret financial documents to aid in the analysis of a client's situation and development of customized financial plans.

II. Duties

Duties of this job include the following:

- Assist with investment research, reporting and implementation.
- Maintain relationships with investment managers and participate in regularly occurring update meetings.
- Assist with research and analysis related to hiring new investment managers and/or offering new strategies.
- Analyze and interpret data for use in preparing client presentations and research papers.
- Write investment management and financial planning content for marketing and education purposes.

III. Qualifications

A. Experience / Education

- Bachelor's degree in finance or related field
- CFP designation and/or CFA candidate or willingness to obtain these designations
- Familiarity with financial concepts and products

B. Skills

- Strong organizational, analytical and communication skills
- Ability to take initiative and ownership and see a project through to completion

- Ability to juggle multiple tasks and meet deadlines
- A high level of proficiency with software applications including knowledge of:
  - Microsoft Office (Word, PowerPoint, Excel)
  - CRM applications (Salesforce)
- Presentation and interpersonal skills needed to successfully interact with prospects, clients, financial professionals, and other associates.

C. Attributes

- Enthusiastic, high-energy, hard-working, self-motivated, disciplined, organized, client satisfaction oriented, warm, friendly, professional and intelligent.
- Ability to work effectively with and add value to a goal-oriented team in both the investment management practice and the firm as a whole.
- Strong quantitative and writing skills and good attention to detail.
- Must have high ethical standards, integrity, and ability to maintain confidentiality of sensitive financial information.

IV. Compensation / Benefits

We offer a competitive salary commensurate with experience and education and an incentive bonus program, as well as opportunities for personal and professional growth. We assist employees with the cost of obtaining professional designations and continuing education. We also offer the potential for a flexible work schedule as an employee develops. In addition to salary, employees receive benefits including health insurance, paid time off, and 401k / Profit-Sharing Plan.