

## JOB DESCRIPTION SENIOR INVESTMENT ANALYST

### OVERVIEW

Three simple values that describe an outstanding culture and career opportunity. We...

- **Serve** our clients, our community and each other in all that we do
- **Grow** personally, professionally and as a firm with our client's goals top of mind
- **Live** a great life as part of a team with a noble purpose

*Purpose:* "...to help people live a great life."

Join a group of good people pursuing a 10x future! The position, within our Investment Team, supports the Chief Investment Officer and our evidence-based philosophy with asset, security and economic analysis, development of analytical tools, research requests, and backup trade execution.

### RESPONSIBILITIES

- Perform and present asset and security analysis in support of our investment models.
- Develop tools processes to support our asset and security analyses.
- Support the CIO in the development of new client solutions.
- Perform and present economic analysis as needed.
- Coordinate responses to bespoke research requests initiated by our advisor team.
- Publish research and articles in support of our marketing and growth initiatives.
- Provide backup support for trade execution.

### QUALIFICATIONS

#### *Technical/Educational Background*

- 5-10 years of relevant experience preferred.
- A demonstrated interest in financial markets and investments required, along with a passion for evidence-based investing.
- Strong and relevant academic credentials (bachelor's degree required).
- Chartered Financial Analyst ("CFA") designation preferred. A demonstrated interest in obtaining the CFA designation within three years required.
- Excellent written and verbal communication skills.
- High technological proficiency including Microsoft Office applications, with advanced knowledge of Excel for data manipulation. Orion Advisor, and Factset experience a plus.

#### *Values/Culture*

- Believes in Strategic's purpose, vision and values
- Attention to detail, rigorous work ethic, humble attitude
- Continually exhibits personal integrity and personal initiative
- Demonstrated ability to drive growth and improve productivity
- Reliable, follows through on commitments, does not shrink from new challenges
- Organized, able to multitask and work independently when needed
- Flexible team player who is highly adaptable to change and open to innovative ideas
- Demonstrated ability to work successfully in an entrepreneurial, small company environment
- Provide references upon request