

JOB DESCRIPTION
TRADER – RESEARCH ANALYST

SERVE | GROW | LIVE

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."

The position, within our Investment Team, supports the Chief Investment Officer with trade execution, trade process efficiency, data maintenance, and fund analysis for both our Retirement Plans and Wealth Management businesses.

Core Responsibilities:

TRADING

- Monitor trade requests and execute requested trades for client accounts
- Set up and execute regular rebalancing for modeled accounts
- Monitor accounts for opportunities to harvest tax losses and execute
- Maintain models and data within the trade management system
- Develop tools and processes to improve the efficiency of our trading activities

FUND/SECURITY ANALYSIS

- Support the Retirement Plans business in monitoring and analyzing plan funds
- Support the Wealth Management Portfolio Managers in monitoring and analyzing model funds
- Document all fund analysis clearly and concisely
- Maintain models, spreadsheets, and data to support Investment Team operations
- Identify opportunities to improve and streamline the fund monitoring and analysis process

Requirements:

TECHNICAL/EDUCATIONAL

- High technological proficiency including Microsoft Office applications, with highly advanced knowledge of Excel (including advanced functions for data manipulation). VBA (or other programming knowledge), Orion Advisor, and Factset experience a plus
- A demonstrated interest in financial markets and investments required
- Strong and relevant academic credentials (bachelor's degree required)
- The Chartered Financial Analyst ("CFA") designation, or the ability and willingness to achieve the CFA designation within 3 years, is required
- Excellent written and verbal communication skills
- 2-5 years of relevant experience preferred

VALUES: SERVE, GROW, LIVE

- Believes in Strategic's purpose, vision and values
- Attention to detail, rigorous work ethic, humble attitude
- Passionate about helping people
- 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
- Ability to collaborate and work effectively with others
- 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