

## **Bogart Wealth**

### **Junior Portfolio Analyst**

#### **Description/Summary:**

The Junior Portfolio Analyst will work closely with the Investment Policy Committee (IPC) and support staff to assist in all areas of the investment process. Key tasks will center around cash management and portfolio research, construction, monitoring and trading related functions. Jr analysts will also be involved with various reporting due diligence assignments and client presentations.

#### **Responsibilities include, but are not limited to:**

- Support with macro and micro economic research and monitoring.
- Conducting qualitative and quantitative analysis of various asset classes, financial instruments, and multi-asset portfolio models.
- Develop and recommend investment solutions using a broad array of asset allocation and client risk tolerance tools and resources.
- Execute multi-million-dollar block trades and/or individual client account rebalances.
- Monitor client accounts (specifically cash positions) to ensure accounts are properly allocated per wealth management agreements and client-advisor-portfolio management updates.
- Monitor and track all firm investments to ensure optimal performance and risk-management.
- Assist with weekly IPC review meetings.
- Drive improvements and efficiencies in data processes and management.
- Prepare financial proposals and client portfolio reviews as needed.
- Perform research and execute special projects on request.

#### **Qualifications:**

- Strong passion and knowledge of global financial markets.
- Ability to interact and communicate effectively with colleagues and clients, and willingness to perform a wide range of tasks.
- Attention to detail, critical thinking, resourcefulness, multi-tasking, and working independently.
- Solid analytical and modeling skills in Microsoft Excel, with intermediate knowledge of Visual Basic Application (VBA) a plus.
- Excellent written and verbal communication skills.
- Experience and comfort trading high net worth accounts a major plus.
- Progress towards Chartered Financial Analyst (CFA) designation or other investment designations preferred.
- College degree with significant coursework in finance, economics, or related fields.