

Based in New Albany, OH, VELA Investment Management is a vertically integrated wealth and investment advisory firm, serving individuals, families, non-profits, and institutions. Our primary goal is to deliver long-term results for our clients in a consistent and transparent manner. We accomplish this through experienced investors employing a valuation-centric approach with a long-term temperament and aligning our interests with those of our clients.

## **JOB TITLE**

Equity Trader/Sr. Equity Trader

## **SUMMARY**

We are currently building out our trade desk to accommodate client growth and are seeking a highly motivated Equity Trader/Sr. Equity Trader with 3+ years' experience in a buy-side trading role.

## **KEY RESPONSIBILITIES**

- Ensure timely and accurate execution and settlement of all trade orders including domestic and foreign securities, ETFs, and options; ensure that decisions made by the portfolio management team are executed in accordance with best execution practices.
- Manage broker-dealer relationships.
- Serve on VELA's Best Execution and Valuation Committees; review trade execution.
- Interact with various SMA and WRAP sponsor teams on trading, administration, operations, and other sponsor correspondence.
- Utilize electronic trading strategies.
- Responsible for verification and management of cash flows in portfolios.
- Assist Portfolio Managers in researching and managing option positions.
- Conduct fund and account reviews with Portfolio Managers, reviewing position size, drift, and performance.
- Conduct collateral account management and OMS maintenance (APX, Schwab, and/or Vestmark experience a plus).
- Create and maintain process documents for critical trading workflows; establish and enhance workflow efficiencies.
- Cross-train team members on various trading tasks and responsibilities.
- Interact with all Investment Team members including Portfolio Managers and Research Team.

## **ESSENTIAL SKILLS**

- Strong attention to detail and excellent analytical skills with the ability to multitask and prioritize responsibilities even in a fast-paced work environment.
- Strong communication skills combined with superior organization and effective decision-making skills.
- Demonstrated success in establishing and improving processes and workflows.

## **EDUCATION & EXPERIENCE**

- Bachelor's degree from an accredited university or college in accounting, finance, business, engineering, or related field required.
- 3+ (ideally 5 or more) years' experience in a buy-side trading role.

- CFA preferred.
- Desired technical experience:
  - Advent suite of products including trade order management systems
  - Bloomberg
  - Derivatives and fixed income trading
  - Python and SQL a plus

At VELA, we recognize that our team members are our finest assets. They are dependable, collaborative, and innovative. We prioritize cultivating and supporting our team members, and we endeavor to create and nurture a culture of continuous learning and intelligent investing.

Interested? Please send a current resume to [recruiting@vela-im.com](mailto:recruiting@vela-im.com).

VELA is an equal opportunity employer.

