



THE JOSEPH GROUP
CAPITAL MANAGEMENT

Position Description

Title: Senior Investment Analyst
Reports to: Chief Investment Officer
Benefits: Yes
Status: Full Time

Key Responsibilities

- **Communication**
 - External - Client and Wholesaler relationships
 - Internal – Advisor/Investment Committee communication
- **Manager Research/Security Selection**
- **Investment Operations – Trading Backup**

Job Summary

The ideal candidate will have a passion for investment research and communicating investment concepts to internal and external stakeholders. As a member of The Joseph Group's (TJG) Investment Team, the Senior Investment Analyst (Analyst) will use their experience and expertise to apply research into mutual funds, ETFs, and individual stocks to the objective-based portfolio management process at TJG. Solid relationship skills are essential as the Analyst will serve as the first point of contact with outside investment firms. The analyst will also be responsible for communicating investment concepts and "The TJG Way" to clients and prospects while also assisting in internal investment communication with the advisor team and investment committee. The ideal candidate will be comfortable navigating conversations with multiple audiences including internal team members, clients, salespeople, and portfolio managers. Strong presentation skills are necessary as the Analyst will be tasked with sharing ideas and delivering educational presentations. The Analyst will support investment operations initiatives and serve as the primary backup for our trade rebalancing and portfolio management software. Key qualities include a pursuit of self-directed learning, the ability to translate concepts to actionable ideas, and approaching capital markets with a degree of humility and a sense of curiosity.

Duties and Responsibilities

- Serve as first point of contact for outside investment firms; take calls, facilitate conversations, and manage calendars as needed
- Absorb proactive macroeconomic, asset class, and security specific research and engage in proactive conversations to assist in the investment decision making process
- Participate in research calls, webinars, and meetings; take notes and document ideas for portfolios and/or educational presentations
- Oversee updating and maintenance of TJG's "bullpen" of prospective funds, ETFs, and stocks and proactively look for places where current portfolios may be improved

- Maintain research due diligence files and draft Thesis Review and Verification reports
- Provide client investment recommendations and support to Advisory Services Team as needed (i.e., 401(k) allocations, individual security recommendations)
- Provide oversight and documentation for the investment lineup of TJG's retirement plan platforms
- Deliver educational presentations to internal and external audiences (i.e. 401(k) clients) as needed
- Facilitate timely dashboard reporting for securities within objective-based portfolios
- Be willing, as needed, to serve as a backup for Investment Operations; utilizing trading software to buy and sell securities as needed within client accounts to raise cash, invest deposits, or satisfy other needs

Qualifications

The Senior Investment Analyst position typically requires the following qualifications:

- To embrace and live our Core Values of Integrity, Teamwork, Humility, Excellence, and Enthusiasm
- Bachelor's degree from an accredited college or university.
- Chartered Financial Analyst (CFA) Charterholder or significant progress in obtaining the Chartered Financial Analyst (CFA) designation
- Excellent communication, listening, and relationship building skills
- Strong analytical skills, detail oriented with a high degree of accuracy
- A passion for caring for clients through their finances
- Expertise in Microsoft Office suite, especially Excel. Must learn Advisor Rebalancer trade rebalancing software, Advisor View portfolio management software, and Advisor CRM software
- A team player in The Joseph Group's "Best Places to Work" culture
- Desire/ability to work successfully in a small company environment
- Proactive, self-motivated personality

Salary and Benefits

Pay/benefits are competitive based on industry standards.

- Salary will be based on experience
- Benefits include health insurance, 401(k), disability insurance...
- Partial and/or full financial support for professional accreditation/continuing education requirements and other education/training opportunities

Contact

Send resume and cover letter to:

Alex Durbin, CFA

Chief Investment Officer

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