

Arnerich Massena Position Posting: Senior Research Analyst - Alternatives

SUMMARY

Position overview: Senior Research Analyst - Alternatives

The main responsibility of this position is to conduct investment manager research and due diligence on alternative investment strategies and firm. The analyst will also complete various industry and market research and client-related projects. The analyst will execute projects and research by direction of the CIO, advisors, or research manager. The analyst will write and present investment manager facts and findings to advisors, analysts, committees and clients, and is expected to participate in committee meeting discussions.

About Arnerich Massena

Founded in 1991, Arnerich Massena is a West Coast-based investment advisory firm that provides discretionary and advisory services for institutional and private investors. The firm works with private clients and families, and endowments and foundations. Arnerich Massena is distinguished by a focus on exceptional client service, top-tier investment research, and a long history of building creative, high-quality investment programs. For more information, please visit our website at www.arnerichmassena.com.

At Arnerich Massena, we believe that our people are our greatest asset. With this in mind, we offer a unique corporate culture and competitive benefits package. We are committed to community service and invite employees to spend a portion of their work week volunteering for our community service program. Throughout each year, the firm hosts events for employees to inspire an environment of engagement, appreciation, and team cohesiveness. Our benefits package includes comprehensive health, dental, and vision insurance; a 401(k)-retirement plan; and a generous sabbatical program. Visit our careers page at <https://arnerichmassena.com/careers>.

POSITION DETAILS

Essential Functions:

- **Client projects**
 - Lead or assist in the preparation of client projects relating to all aspects of the development and maintenance of the investment program. This may include, but is not limited to, manager searches, portfolio characteristics analyses, portfolio implementation, cash flow analyses, and client memos.
 - Attend client meetings, on site or in our office, as requested to support advisors in presenting client projects and making recommendations.

- **Manager Discovery and Due Diligence**
 - Assist in developing and monitoring Arnerich Massena’s approved manager list across a broad range of alternative strategies.
 - Source, sponsor, nominate, and present potential investment managers to the Product Committee for inclusion on the approved manager list.
 - Maintain regular contact with approved and “on deck” managers, including travel for on-site due diligence, annual meetings, and other manager related research.
 - Carry out and communicate to the Firm and clients investment manager due diligence activities, opinions, and commentary.
 - Attend client meetings, on site or in our office, as requested to support advisors in presenting information on approved managers.
 - Continually develop and expand on a network of industry contacts and resources.
- **Capital Markets Research**
 - Assist in developing market commentary for internal and external distribution.
 - Assist in the research effort of new and evolving asset classes and rationale for portfolio inclusion.
 - Maintain knowledge of global economic and capital market issues and participate in Investment Committee meeting discussions.
- **Internal Meetings**
 - Participate and assist in the preparation and dissemination of the Investment and Product Committee meeting materials.
- **Communications and Mentoring**
 - Assist and participate in Arnerich Massena sponsored events, including investment manager client events.
 - Act as a resource to internal clients (advisors, other analysts, other departments).
 - Present to Firm staff on Analytics department functions and investment intelligence.
- **Other duties as assigned**

Qualifications:

- Must have a four-year college degree and a minimum of four years of relevant alternative investment experience.
- Advanced degree, CFA, or CAIA designation preferred.
- Ability to write and communicate effectively and prepare attractive presentations, exhibits, write-ups, and correspondence.
- Strong math, analytical, and research skills are mandatory.
- Ability to explain complex financial concepts is required.
- Must interact effectively with clients, investment managers, and Arnerich Massena staff.
- Knowledge of financial securities and terminology, portfolio theory and analysis, domestic and foreign financial markets and economies, statistics, and financial analysis is essential.
- Must have a working knowledge of various information technology interfaces such as spreadsheet, word processing, graphics, and database platforms.



- Ability to adapt quickly to new software applications must be demonstrated.

Arnerich Massena seeks candidates who demonstrate a strong work ethic and the ability to be self-motivated. Candidates must be client service-oriented, with excellent organizational, communication, and interpersonal skills. This position requires both the ability to work effectively as part of a team and the ability to work independently. We seek candidates who can thrive in a challenging, fast-paced, and deadline-driven environment.

HOW TO APPLY:

Please submit your resume and a cover letter via email. We will review all submissions and contact only those candidates who meet the above requirements.

Ben Larsen, Research Manager

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