

## Arnerich Massena Position Posting: Research Analyst

### SUMMARY

#### Position overview: Research Analyst

The primary responsibility of this position is to lead or assist in client projects relating to all aspects of the investment program. The analyst may also conduct investment manager discovery and due diligence at the direction of advisors, the CIOs, analytics department manager, or senior research analysts. 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. Additionally, the analyst will support investment performance reporting and deliver research analysis for prospects and clients.

#### About Arnerich Massena

Founded in 1991, Arnerich Massena is a West Coast-based investment consulting 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](http://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:

##### Portfolio Construction

- Assist in preparing the Investment Policy Statement and overall strategy for investing client's assets and developing their financial plan
- Assist with asset allocation for existing and prospective clients

- Construct globally diversified, multi-asset portfolios to achieve client objectives
- Use both quantitative and qualitative techniques

### **Markets & Macroeconomic Research**

- Conduct global market and macroeconomic research to stay informed of current and future developments, trends, and themes
- Present research to Investment Committee to discuss and debate ideas

### **Manager Research and Selection**

- Evaluate and select top investment managers across asset classes to satisfy various client mandates
- Conduct ongoing manager due diligence of existing manager platform

### **Reporting, Operations, and Business Development**

- Produce reports, analyses, and presentations for prospective clients
- Produce client reports covering performance, fees, and other ad-hoc requests
- Monitor accounts for risk exposures and drift from policy
- Act as a resource to internal clients (advisors, other analysts, other departments).

### **Qualifications:**

- Four-year college degree and academic or internship experience in finance, investments or related industry strongly preferred.
- Progress or strong desire to pursue the Chartered Financial Analyst (CFA) designation.
- Focus and attention to detail on work that is frequently routine with a high level of accuracy is required. Commitment to completing projects on deadline and seeking efficiency and polished output is needed.
- Strong math, analytical, and research skills are mandatory.
- Basic knowledge of financial securities and terminology, portfolio theory and analysis, domestic and foreign financial markets and economies, statistics, and financial analysis is essential.
- Ability to explain complex financial concepts is required; confident public speaking and presentation skills preferred.
- Ability to interact effectively and professionally with a variety of internal and external contacts, such as clients, investment managers, and Arnerich Massena staff.
- Proven ability to write and communicate effectively and prepare attractive presentations, exhibits, write-ups, and correspondence.
- Must have a working knowledge of various information technology interfaces such as Microsoft Office, including spreadsheets, word processing, graphics/presentation software, and database platforms. Advanced Excel skills strongly preferred.



Arnerich Massena seeks candidates who demonstrate a strong work ethic and the ability to be self-motivated. Candidates must be committed to providing superior customer service with a focus on quality and resolving customer service issues in a timely manner. Attention to detail and strong organizational skills are required. 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 send your resume and a cover letter via email or fax. We will review all submissions and contact only those candidates who meet the above requirements.

Shelly Kapoor, Chief Operating Officer

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