



## Position Description

Title: Research Analyst

Date: April 20, 2018

## Company Description

Danda Trouvé Investment Management provides independent investment management and financial consulting for individuals and families. Our firm has two generations of experience managing money and investments, and has a loyal client base built on trust and hard work. We value balancing a family friendly atmosphere with efficiency and a strong work ethic.

## Job Summary

Under the direction of the Chief Investment Officer (CIO), the Research Analyst will perform research and analysis for the investments in the firm's model portfolios. This will include equities, ETF's, bonds, preferred stocks, commodity funds, and alternative investments. This person will also assist the CIO with portfolio construction and administration of the investment strategies.

## Duties and Responsibilities

- Maintain the equity models, rebalance at both the model and client level as directed. Research and recommend modifications to the models based on current market conditions.
- Maintain fixed income model and income strategies. Manage called securities, and research and buy individual bonds and bond funds in accordance with the model.
- Research new opportunities for alternative investments for qualified clients.
- Maximize cash strategies and source cash for client needs.
- Oversee and/or execute trades.
- Construct and maintain spreadsheets for models and rebalancing.
- Research and manage corporation actions.

## Qualifications

- Minimum of a bachelor's degree in business, finance, economics, or similar.
- 2 to 5 years of experience within financial services (asset management, investment bank or private equity preferred)
- MBA and/or progress towards a CFA charter (preferred).
- Must be organized, detail-oriented and able to multitask and set priorities.
- Must have strong analytical skills.
- Must be proficient in Microsoft Office, especially Excel.

- Must be a self-starter, comfortable taking initiative with a client first attitude.
- Must be a demonstrated team player, comfortable working collaboratively with other team members.
- Must have the desire and ability to work successfully in a small company environment.

### Salary

- Pay/benefits are competitive based on industry standards. Salary will be based on experience.
- Partial and/or full financial support for professional accreditation and continuing education and other education/training opportunities are available, as appropriate to the position.

Contact information to learn more about the job or submit an application:

[mtrouve@dandatrouve.com](mailto:mtrouve@dandatrouve.com)

Danda Trouvé Investment Management is an Equal Opportunity Employer