



Research Associate

Monte Financial Group, LLC is a fee-only financial planning and investment advisory firm based in Guilford, Connecticut. We are a growing team of seven separated across three business segments: Financial Planning, Asset Management, and Trust Services. We are currently seeking a Research Associate to join our growing Asset Management division.

The Research Associate (RA) will focus on providing securities analysis to aid portfolio managers in the investment process. The RA must have strong problem solving and time management capabilities.

Jobs Specifications:

- Perform fundamental analysis on prospective and currently owned companies for our in-house equity portfolios.
- Prepare communications, such as reports and presentations, to provide insights on what the analysis reveals to facilitate decision-making.
- Develop statistical and analytical models to derive conclusions from specific data sets.
- Complete portfolio maintenance tasks such as weekly exposure updates and quarterly reports.
- Process portfolio analytics and provide proper reports for portfolio strategy meeting.
- Perform analysis on client external accounts and present findings.

Qualifications:

- Bachelor's degree in business-related field
- 1-3 years of experience within the financial industry
- Proficient in Microsoft Office (specifically Excel and PowerPoint)
- Preferably Bloomberg Certified
- Mathematics and statistics skills to work with the data and develop models
- Analytical and critical thinking skills to find value and understand what's in the data
- Focus and organization to work on multiple tasks and projects
- Technology skills to work with various research, data analytics, modeling and predictive tools
- Strong interpersonal skills, exemplifying the ability to communicate with teammates and clients when needed.
- Problem-solving skills to address the challenges of data collection and analysis

***License Required:** Must have Series 65 or pass within first 6 months of employment.

All qualified applicants will receive consideration for employment and will not be discriminated against on the basis of race, color, religion, sex, sexual orientation, national origin, age, disability, protected veteran status, genetic information, marital status, gender identity or any other impermissible criterion or circumstance. Monte Financial Group, LLC also takes affirmative action in support of its policy to hire and advance in employment individuals who are minorities, women, protected veterans, and individuals with disabilities.