



Research Associate

Firm Overview

Monte Financial Group, LLC is a fee-only financial planning and investment advisory firm based in Guilford, Connecticut. We are a growing team of eight 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.

Job Summary

The Research Associate (RA) will work closely with the Chief Investment Officer (CIO) and Asset Management team to complete qualitative/quantitative research and analysis to assist in the portfolio decision-making process. An RA will use statistical, and data modeling techniques and tools to provide insights on in-house equity investments, economics, and capital markets.

Key Accountabilities

- Develop statistical and analytical models using Bloomberg and Microsoft Excel to derive conclusions from specific data sets.
- Complete fundamental research and 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.
- Complete portfolio maintenance tasks such as weekly exposure updates and quarterly reports.
- Process portfolio analytics and provide proper reports using accounting software for investment strategy meeting.
- Perform analysis on client external accounts and present findings using Microsoft PowerPoint.

Qualifications

- Has advanced analytical and quantitative skills
- Possesses exceptional technical, written, and verbal skills
- Has in-depth skill in developing financial models using Bloomberg and Microsoft Excel and presentations in Microsoft PowerPoint
- Is well organized, with very high attention to detail and accuracy.
- Must exemplify problem-solving skills to address the challenges of data collection and analysis.
- Is a self-starter who takes initiative and is a progressive thinker
- Works well on a team and can prioritize their own work, set objectives, and complete time-sensitive tasks.
- Exemplifies professional standards, honesty, and integrity

Education, Experience, Licenses & Designations

- BA/BS degree in business related field or economics
- Proficient in Microsoft Office (specifically Excel and PowerPoint)
- Preferably Bloomberg Certified
- Must have Series 65 or pass within the first 6 months of employment
- Desire to pursue financial designations

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.