**Investment Analyst**

Location: remote and office (Basildon)

**About Us**

We are a turnkey discretionary investment management service exclusive to financial planning firms. Our business is growing rapidly and we currently manage over £250 million in assets. Our vision is to offer low-cost evidence-based institutional level portfolios designed to capture the global market return over the long-term, while eliminating unnecessary costs, inefficiencies, and anxiety for firms and their clients.

We also provide software that illustrates sustainable withdrawal strategies in retirement income portfolios, provides risk profiling, client fact-finding and other elements of the financial planning process. This software is used by financial planners in several countries including the UK and the US.

We value smart communication, ownership and accountability and promote a flexible working environment.

**About You**

We’re looking for someone to join our investment team and hit the ground running in implementing the model portfolio service across a range of investment platforms. This is an exciting role for anyone wanting to further their knowledge of investment management as you will be involved in all elements of the process.

Absolute must haves:

* Understanding of what financial advisers/planners do.
* Experience of working in a technical or paraplanning role, including rebalancing client portfolios on platform, dealing with cash contributions and raising cash for withdrawals.
* Advanced Excel skills.
* Strong communication skills and the ability to explain the complex in plain English.
* IMC or Diploma in Financial Planning.
* Process driven approach, with excellent attention to detail.

An advantage:

* Degree in a numerical subject.
* Working knowledge of MATLAB and other programming languages.

**Responsibilities**

You will work within our investment team and assist them with the following:

* Day to day management of discretionary model portfolios for financial advice firms.
* Administering and monitoring client portfolios, including cash management, rebalancing and liaising with platform providers.
* Dealing with adviser queries to support the DFM service, through the onboarding process and throughout the relationship.
* Producing client-facing materials.
* Conducting quantitative analysis of investment products using software such as FE Analytics, Morningstar AWS.
* Contributing to relevant team projects and the ongoing development of the firm.

**Remuneration Package**

* Competitive salary depending on experience
* Non-contributory pension scheme
* 20+ days holiday (plus public holidays)
* Flexible hours
* Hybrid working
* Cost of relevant professional qualifications and memberships
* Potential to join company option scheme