**Role:  Investment Analyst**

**Location: Hybrid (home and office (typically once per week), London)**

**Who are we**

We are a turnkey discretionary investment management service exclusive to financial planning firms. As the fastest growing DFM service in the UK, we currently manage almost £2b 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.

This is an exciting role at an early-stage company in a great team. We promote a coaching-led supportive working environment. We value smart communication, ownership and accountability and promote flexible working.

**Who we’re looking for**

We’re looking for someone to join our investment team and hit the ground running in implementing and supporting the model portfolio service across a range of investment platforms. This is a varied 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, and challenges they face.
* Experience of working in a technical or paraplanning role, including rebalancing client portfolios on platform, dealing with cash contributions and raising cash for withdrawals.
* Client service driven approach, aiming to be the best!
* Strong communication skills and the ability to explain the complex in plain English.
* Process driven approach, with excellent attention to detail.
* IMC, Diploma in Financial Planning or equivalent.

An advantage:

* Work experience in a DFM or MPS business.
* Degree in a numerical subject.
* Advanced Excel skills.

**Your responsibilities**

You will work within our investment team and be responsible for 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.

**What we’re offering**

* Competitive salary and benefits package, dependent on experience
* 28 days holiday plus statutory holidays
* Non-contributory pension scheme
* Potential to join the company option scheme
* Cost of relevant professional qualifications and memberships
* Flexible working
* Hybrid working