

Collaboration Capital

Investment Analyst Job Description

We are a national wealth advisory practice whose clients include forward-looking families and institutions investing in companies dedicated to solving huge global challenges. Its core mission is to deliver alpha-generating portfolios across the spectrum of problem-solving public equity, public debt, private equity, and private debt, benchmarked to traditional indices. A founding tenet is a shared belief in the power of capital markets to positively effect change. Critical thought, primary research, transparency, and embracing change opportunistically are hallmarks of our investment process and philosophy.

We are expanding our offices in the Northeast and seeking an experienced investment analyst to join our efforts of using the capital markets to address some of the world's greatest challenges. We are looking for a diligent, conscientious, hardworking professional that operates with the highest integrity. The candidate is expected to be a self-starter that does not require constant supervision and is capable of meeting deadlines. They would also exhibit a strong desire to work as part of a team focused on the sustainable and impact investing space.

Given the structure of the firm, the position will support many areas of the organization. Some examples include:

Administrative - Operating in a small regional office will require light administrative duties

Equity research – Analysis of public equities, both domestic and international, with a specific focus on ESG

Client Service - The position will be expected to support client service with report writing, data gathering, and analysis

Portfolio Accounting - Assistance in portfolio accounting responsibilities will be expected

Portfolio Management - Assisting in portfolio management duties such as performance measurement, attribution analysis, scenario analysis, qualitative and quantitative research.

Required skills and experience:

- Bachelors degree
- 5+ years experience in wealth management/asset management
- Familiarity with ESG and Impact investing
- Fluent working knowledge of Microsoft Office suite (Excel, PowerPoint, Word)
- Familiarity with investment analysis/accounting platform tools (Bloomberg, CapIQ, Factset, Advent, Addepar, Barra, etc.)
- Understanding of portfolio construction, attribution analysis and asset allocation

Please send resume and cover letter to: grooney@collaboration.capital