Boston Trust & Investment Management Company

Job Opening: Investment Analyst

Company Overview

Boston Trust & Investment Management Company is an independent, employee-owned, Massachusetts-chartered bank and trust company. The firm provides investment management and fiduciary services to institutional and individual clients, and manages approximately $8 billion in client assets.

The firm employs approximately 60 people at its office location in Boston, Massachusetts. Our client service teams are organized into two business units – "Institutional Strategies" and "Wealth & Investment Management." We also maintain a distinct brand, Walden Asset Management, that represents our leadership in sustainable and responsible investing and active ownership strategies, including shareholder advocacy. Firm-wide, we have professionals responsible for investment strategy, securities research, shareholder advocacy, risk management, operations, client administration, marketing, information technology, finance, and human resources.

Key Responsibilities

The Investment Analyst will conduct primary fundamental research on equity securities across a range of industries. The successful candidate will be interested in a long-term career with Boston Trust, be intellectually curious, have an ability to learn and work independently, and be able to find solutions to complex problems.

- Conduct original research on numerous securities that are being considered for inclusion in portfolios.
- Conduct industry and competitive analyses using established frameworks.
- Formalize investment recommendations based on companies' quality, sustainability, and valuation.
- Work with portfolio managers and analysts on methodologies related to security selection and portfolio composition.
- Update existing investment models, manage data sources, make parameter adjustments as needed, and disseminate output.
- Communicate frequently with portfolio managers and investment committees on analytical process and findings.

Qualifications

Education: BS/BA with significant coursework in accounting, finance, economics, or math.

Experience/Tenure: 2 to 5 years of professional experience in a related role.

Specialized Skills:

- Demonstrated interest in financial markets and investment management.
- Ability to distill key highlights from financial statement analysis into a cohesive written and oral presentation.
- Proficient at Excel.
- Experience with Bloomberg and FactSet is a plus.
- Familiarity with Environmental, Social, and Corporate Governance (ESG) investing standards.
- Professional poise and confidence for effective interactions with all levels within the organization.
- CFA charter, or progress toward the CFA charter, is a plus.

Boston Trust & Investment Management Company and Walden Asset Management are committed to diversity in the workplace. We seek to create an environment where all employees' abilities and energies are fully utilized. We believe diversity enhances our opportunity to build a high-performance culture that enables us to succeed in a competitive business. Reasonable accommodations will be made available to any applicant requesting them for the application process. Boston Trust & Investment Management Company is an Equal Opportunity Employer.