

## Employment Opportunity: Assistant Trader

### About NorthStar Asset Management

NorthStar Asset Management began in 1990 as a public equity and fixed income manager. Our mission is to provide integrative and effective portfolio management by connecting social concerns to stock selection, asset allocation, and activism.

Our investment management process begins with an analysis of the social, ecological, and political problems of our time and includes deep conversations with our clients. These steps result in the construction of personalized portfolios that integrate financial goals with security analysis and selection processes while upholding a commitment to social change and environmental sustainability.

Synthesizing our broad market outlook and the individual needs of the client, we combine direct investments in global equities, investment grade bonds, community loan funds, alternative “outside” investments and cash to create a vibrant and well-balanced portfolio.

### Job Description

The Assistant Trader will play a key role in supporting the work of the Investment Team and coordinating various tasks with the Operations Team. Under the supervision of the Chief Investment Officer, the Assistant Trader will report to the Portfolio Management Team and work closely with the Systems and Data Analyst. She will be responsible for setting up Portfolio Reviews and assisting the Investment Advisors in placing trades with various brokers. She will also be responsible for working with and providing backup to the Systems Data Analyst to ensure smooth operations for trade reconciliation, performance reporting and other tasks and projects related to supporting NorthStar’s investment management process. Over time this person will become responsible for developing, automating, and maintaining efficiencies within the trading and portfolio management systems.

### Key Responsibilities

- Daily preparation of the Portfolio Review System, which includes downloading data from Advent/Axys, Bloomberg, and internal data bases.
- Running various performance reports.
- Rolling up, submitting and tracking trades.
- Communicating the status of trades to the Data and Systems Analyst.
- Helping to manage/develop/execute the systems and processes for effective communication between the Portfolio Management Team and Operations.
- Performing ad hoc analysis and projects to support team members.

### Skills

- Proficiency in Microsoft Office Suite with particular mastery of Excel
- Familiarity with Bloomberg, Access, Advent/Axys, Filemaker Pro (helpful)
- Knowledge of at least one programming language (helpful)

## Desired Traits/Qualifications

- Bachelors' degree in computer science/economics/applied math/statistics or engineering.
- A minimum of two years of work experience in a STEM or finance related field.
- Enjoyment of working with data.
- Exceptional organizational skills.
- Detail oriented and able to follow instructions.
- Ability to juggle multiple projects and clearly articulate outcomes, concerns and solutions.
- Comfortable working on complex problems/puzzles and looking for ways to complete tasks accurately and efficiently.
- Creative, flexible thinker who takes an innovative and entrepreneurial approach to building tools to organize data and problem solve.
- Desire to take ownership of work and follow through on tasks.
- Ability to work both independently and in a team.
- Eagerness to work in a small company environment.
- Commitment to social change.
- Sense of humor (a must).
- Good listener.
- Willingness to learn.

## Team Culture/Benefits

- A collegiate, casual, collaborative, and high-performing work environment.
- Professional learning supported.
- Competitive compensation package.
- Strong benefits package.

## Equal Opportunity

NorthStar is strongly committed to diversity and inclusion. NorthStar provides equal employment opportunities (EEO) to all employees and applicants for employment without regard to race, color, religion, gender, gender identity, sexual orientation, national origin, age, disability or genetics. The NorthStar workplace is an environment that is welcoming and inclusive for everyone.

NorthStar encourages women and people of color to apply.

## How to Apply

NorthStar Asset Management, Inc. is a socially responsible investment firm in Boston, MA. For more information about us, please visit [northstarasset.com](http://northstarasset.com).

To apply, please email your resume and cover letter to [jobs@northstarasset.com](mailto:jobs@northstarasset.com) with Assistant Trader in the subject line. No phone calls, please.