

Research Analyst – Impact Focus

Ballentine Partners, LLC, is a leading independent investment and wealth management firm headquartered in the Boston area with additional offices in Florida and New Hampshire. Our client families rely on us to be their most trusted advisor and to manage all aspects of their complex financial lives. We are a team of over 80 professionals and our firm is known as a wonderful place to work. Our compensation philosophy and team structure foster a collegial rather than competitive work environment. We are unusual in the financial services industry in that we believe our employees' having a balanced life makes them better at their work. We are proud that in 2017, Pension & Investments named Ballentine Partners as one of the best places to work in money management.

This is a fantastic opportunity for an exceptional professional interested in working at a growing and successful firm. If you have strong technical skills and exceptional emotional intelligence, we would like to speak with you.

Responsibilities will include:

- Work with senior analyst to identify, analyze, and recommend impact investments
- Maintain database of manager and vehicle research
- Work to further impact reporting for chosen investment vehicles in client portfolios
- Work effectively with our professional contacts, including investment managers and industry experts
- Prepare written research reports, and make presentations to both internal and external constituencies
- Analyze the impact of macroeconomic trends and events on investment industries (i.e. solar) and client portfolios
- Provide research support in other asset classes as needed
- Other duties as assigned

The ideal candidate will have a minimum of 2 years relevant experience, plus:

- Bachelor's degree
- CFA credentials preferred
- Experience and interest in impact investing
- Strong working knowledge of investments and portfolio management
- Skills in problem analysis and resolution at both strategic and functional levels
- Strong math and modeling skills
- The ability to handle multiple projects simultaneously; highly organized and attentive to details
- Excellent interpersonal, communication and presentation skills
- Ability to work independently

To apply, please visit our [hiring portal](#) or check our website (www.ballentinepartners.com) for more details.

We are an equal opportunity employer.

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