



Position Description

Title: **Analyst**
Reports to: Andy Popenfoose – Chief Investment Officer
Benefits: Yes
Status: Exempt

The Company

SYM Financial Advisors is searching for a responsible, energetic and detail-oriented candidate to serve our clients as part of a team. Since 1968, SYM Financial Advisors, a private, employee-owned, independent financial advisory firm, has remained dedicated to a client-centric philosophy of devoting the extra time, resources and energy to uniquely know each client and their goals. Rooted in traditional values, SYM Financial Advisors serves as a trusted expert, using our team's deep knowledge and vast experiences to be an advocate for our clients and help them achieve their vision of financial success.

Job Summary

This is a position for candidates possessing a blend of financial and economics research abilities, as well as effective written and oral communication skills. SYM seeks an individual with strong analytical, quantitative, and organizational skills with a desire to work in an ethical, pragmatic, scientifically grounded wealth management firm which values uncommon client relationships. Multi-asset portfolio construction, monitoring, and communication duties will be the role's primary emphasis.

Duties and Responsibilities

1. Adhere to SYM's code of ethics as a fiduciary, as well as the applicable CFA Institute Research Objectivity Standards. Integrity and confidentiality are of paramount importance to the analyst's career.
2. Contribute to excellent outcomes within SYM's investment assets under management, currently valued at over \$4 billion, under the direction and supervision of the Chief Investment Officer.
3. Assist with due diligence efforts in the investment selection process. Collaborate with the team to determine optimal weighting schemes once investments are selected. Contribute to sell disciplines and rebalancing decision making.
4. Elevate SYM's investment communications.
 - (a) This includes internally to the SYM team and externally to clients, prospects, and the public. The analyst should be comfortable preparing materials for others to present as well as personally delivering messages. These messages may range from timeless investment education; to translating economic headlines into their impact on various asset classes; to explaining SYM's investment strategy to new hires and in marketing opportunities.

- (b) Written examples include quarterly presentations, model pitchbooks, educational white papers, and written RFP responses. Verbal examples include short videos for SYM's social media presence, oral presentations to the SYM team, and verbal presentations to clients, prospects, and SYM community event attendees. Create easy-to-understand attributions for SYM's flagship models.
5. Conduct occasional competitive intelligence assessments to gauge SYM's place within the investment management landscape while identifying new opportunities.
 6. Perform independent investment research regularly to explore different investment philosophies and strategies. If interesting or significant insights are gained, present your findings to the Investment Department.

Qualifications

1. A master's degree from an accredited college or university. Suitable majors include finance, economics, business, statistics, mathematics, and business analytics. A master's degree in communication and related disciplines may be considered if accompanied by relevant investment industry experience and analytical capability.
2. Progress towards obtaining or desire to obtain the CFA designation.
3. Must possess clear and impactful writing skills, public speaking skills, critical thinking skills, and deep analytical curiosity. Experience responding to requests for proposal ("RFP") is a plus.
4. Must possess a basic understanding of the key principles and theories underpinning capital markets.
5. Ability to present quantitative data to a non-financial audience, to include proficiency in Microsoft Excel, Word, and PowerPoint. Familiarity with programming languages (R/VBA) is a plus. Familiarity with Canva, Tableau, or other graphics packages is a plus.
6. Familiarity with financial data portals is a plus, including Morningstar, Bloomberg Terminal, Capital IQ, or Thomson One as well as public data sources. Familiarity with scholarly journal archives such as JSTOR and SSRN also a plus.
7. Financial services, consulting internship or previous real-world investment management experience a plus, regardless of dollar amount. Experience with a prominent RIA, OCIO firm, Investment Consultancy, or other investment manager serving institutional clients and households is a plus.
8. Ability to manage multiple projects and deadlines in a fast-paced environment.
9. Desire and ability to achieve excellence on a small collegial team.
10. Professional curiosity and desire to learn and develop at an industry-leading firm.

Salary and Benefits

Pay / benefits are competitive based on industry standards.

- Competitive pay based on experience plus incentive compensation
- Health Care, Vision, Dental / Orthodontic, Life and LTD Insurance
- 401(k); 6% Match ; Tuition / Certification Assistance Program
- Paid Time Off / Parental Leave / Family Time Off / Volunteer Time Off