Investment Analyst Associate Job Description
Yanni & Associates Investment Advisors, LLC (YAIA)

Job Objective:

As an Investment Analyst Associate at YAIA, you will analyze and evaluate investment vehicles, client investment accounts, and prospective client assets for retention and the growth of the Firm. You will prepare various reports & written correspondences; maintain files & databases, compile statistics on investment and other miscellaneous projects. Various responsibilities may also include compliance, marketing, technology, and others as assigned by the Principal of the Firm.

YAIA is a privately owned Investment Advisory Firm with approximately $60 million in assets under management with clients in 16 different states. We provide investment management services primarily for wealthy families. Working for one of the top Investment Firms in Pittsburgh will require you to demonstrate passion and dedication for the Investment Industry. You must be enthusiastic to work independently and also in a small-Firm environment. Outlined above are the primary focuses of being an Investment Analyst Associate. However, the responsibilities in any small Firm are broader as there are opportunities to utilize a variety of your skills that otherwise would not exist in a larger financial institution. Thus, you will need to creatively and cost effectively find solutions to ongoing small-firm business issues. This position will be exciting for those candidates eager to learn multiple skillsets in the investment industry.

You will report directly to the Principal of the Firm.

Key Responsibilities:

- Provide analytical support to Principal of the Firm on a variety of investment related projects
- Develop periodic portfolio reviews/financial presentations; complete detailed analysis of client's existing and prospective holdings using Excel Spreadsheets and other internal software
- Provide input and recommendations to the Principal for Firm-related investment decisions and overall investment philosophy
- Edit and eventually draft Firm's quarterly newsletter
- Update Company website as necessary for "minor" changes (this skill can be learned)
- Update client's cost basis manually as needed
- Complete market research & analysis; report on competitive activity; prepare marketing materials
- Assist with developing and implementing strategic marketing/sales plans
- Assist with prospect and client presentations and overall client retention through exceptional service and consultation
- Assist with tax, computer software & hardware, analysis of rental leases and internal insurance
- Attend Compliance Events, Marketing Events, and Educational Seminars on Firm's behalf
- Update Firm's compliance documents as necessary (for example, YAIA's ADVs)
- Correspond with Investment Custodians and various affiliates as necessary
- Perform these and other responsibilities assigned by the Principal in a timely manner

Requirements:

- Experience in the investment industry preferred
- College Degree in Finance or related field or MBA preferred;
- Advanced investment related designations (CFA or CFP) or progress towards are advantageous
- FINRA Series 65 or higher degree will be required –
    - if Series 65 or a higher degree such as the CFA is not already attained, studying will need to be completed off-work hours; test can be completed during work-hours. Test will need passed within time allotted based on experience level.
- Intermediate level of knowledge with Microsoft Excel and Word; other computer skills required
- Strong work ethic, detail orientation and a passion for excellence
- Ability to interact and cooperate with all Company employees, affiliates, and vendors
- Excellent verbal and written communication skills; drafting letters and communicating complex investment-related concepts to clients, prospects, and to the Principal of the Firm
- Excellent in prioritizing tasks
- Ability to manage multiple tasks simultaneously and self-motivated
- An analytical aptitude, inquisitive nature and passion for uncovering insights
- Strong organizational skills and attention to detail; team player in small office environment and the ability to work independently; takes the initiative to learn and resolve issues
- Demonstrates a passion for the investment industry as well as an interest to continue to learn
- Professional in appearance, tact, diplomacy and judgment

Hours: 8:30 A.M. - 5:00 P.M.; additional hours and travel will be required periodically potentially for participating in client meetings, networking events, educational seminars, and other.

Salary budget is $35,000 - $50,000 + bonus; offer will be commensurate to experience. Within reason, other qualified candidates will be considered.

Retirement, Health Care, Vision, & Dental Benefits offered

Please email with resume – HR@yanniassociates.com

Please see our website for further information on YAIA – www.yanniassociates.com

All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, national origin, protected veteran status, or disability status. All inquiries will be kept confidential.

Interviews will start in September, 2016.