

Junior Analyst: Mutual Fund Monitoring and Data Analysis

Schultz Collins Lawson Chambers, Inc. is a growing San Francisco investment advisory firm that helps investors make informed financial decisions. We assist clients in building prudent diversified, low-cost, risk-controlled portfolios. We then measure and report how the portfolio is helping the client progress toward his or her financial goals.

We seek a detail-oriented, computer-literate individual to assist in preparing client reports and other deliverables. Interested candidates should have a basic understanding of investment concepts and should seek to develop skills in the areas of: asset allocation, diversification, investment prudence, market efficiency, determinants of risk and return, and alternative portfolio management styles.

Responsibilities:

- Extract data, prepare and produce client reports, and fund evaluations.
- Assist portfolio managers with rebalancing client portfolios.
- Update/maintain portfolio management database (dbCAMS+).
- Export dbCAMS+ data to SCLC website.
- Help develop, document and automate reporting procedures.
- Assist with the preparation of client Investment Policy Statements.

Qualifications:

- BA/BS in statistics, economics, finance, business administration, or other related field with coursework in statistics or equivalent experience desirable.
- Proficiency in Excel and Word a must.
- Candidates who know Morningstar, dbCAMS+, and/or Ibbotson preferred, but not required.
- Excellent oral and written communication skills.

This is a numbers heavy, computer savvy, detail-oriented position at a rapidly growing firm. To learn more about us, please visit www.schultzcollins.com. Send resume and cover letter to Jeremy@schultzcollins.com. No calls please.