FIRM OVERVIEW

Monte Financial Group, LLC is a fee-only financial planning and investment advisory firm based in Guilford, Connecticut. We are a growing team of nine separated across two business segments: Wealth Management and Asset Management. We are currently seeking a Research Associate to join our growing Asset Management division.

JOB SUMMARY

The Research Associate (RA) position is full-time, in-person at our office in Guilford, CT. An RA will work closely with the Chief Investment Officer (CIO) and Asset Management team to complete in-depth research and analysis to support the firm's portfolio monitoring process. An RA will use statistical and data modeling techniques and tools to provide insights on the firm's equity investments, economics, and capital markets.

KEY ACCOUNTABILITIES

- Develop automated analytics using the Bloomberg Query Language and Microsoft Excel to analyze market, economic, or company specific data.
- Complete fundamental research and analysis through various written reports to support the portfolio monitoring process.
- Leverage the firm's portfolio attribution software to develop portfolio and trading analytics.
- Complete trading responsibilities for assigned strategies.
- Perform analysis on external client accounts and present findings using Microsoft PowerPoint.

QUALIFICATIONS

- Advanced analytical and quantitative skills.
- Possesses exceptional data science, written, and verbal skills.
- In-depth skill in developing analytics using Microsoft Excel.
- Well organized, with very high attention to detail and accuracy.
- Must exemplify problem-solving skills to address the challenges of data collection and analysis.
- A self-starter who takes initiative and is a progressive thinker.
- Works well on a team and can prioritize their own work, set objectives, and complete time-sensitive tasks.
- Exemplifies professional standards, honesty, and integrity.

EDUCATION, EXPERIENCE, LICENSES & DESIGNATIONS

- Expected graduation May 2024
- BA/BS degree in Business related field, Economics, or Computer Science. May also qualify if have MBA or MSBA.
- Proficient in Microsoft Office (specifically Excel)
- Bloomberg Terminal experience preferred
- Must have Series 65 or pass within the first 6 months of employment
- Desire to pursue financial designations

HOW TO APPLY

For further inquiry, please email **benjamin.monte@montefinancialgroup.com** with an attachment of your resume as a PDF.

For additional company information you may find us on **LinkedIn** or on our **Website**.