



RESEARCH ASSOCIATE

FIRM OVERVIEW

Monte Financial Group, LLC is a fee-only financial planning and investment advisory firm based in Guilford, Connecticut. Our expanding team of eleven operates across two business segments: Wealth Management and Asset Management. We are currently looking for a Research Associate to join our Asset Management division and contribute to our continued growth and success.

JOB SUMMARY

The Research Associate (RA) position is a full-time, in-person role located at our Guilford, CT office. 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

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

QUALIFICATIONS

- Strong analytical and quantitative abilities.
- Exceptional skills in data science, as well as written and verbal communication.
- Advanced proficiency in developing analytics using Microsoft Excel.
- Highly organized with a keen attention to detail and accuracy.
- Demonstrates problem-solving skills to address the challenges in data collection and analysis.
- A proactive self-starter with innovative thinking.
- Capable of working effectively in a team while managing individual priorities, setting objectives, and completing time-sensitive tasks.
- Upholds professional standards, honesty, and integrity.

EDUCATION, EXPERIENCE, LICENSES & DESIGNATIONS

- Recent graduate with a BA/BS degree in Business, Economics, Computer Science, or related fields; candidates pursuing an MBA or MSBA may also qualify.
- Proficient in Microsoft Office, specifically Excel.
- Bloomberg Terminal experience is preferred.
- Must hold a Series 65 license or obtain it within the first 6 months of employment.
- Desire to pursue financial designations.

HOW TO APPLY

For further inquiry, please email madelyn.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](#).