

## **Financial Analyst – Full Time Position**

### **Company Profile**

Advisor Partners, LLC (AP) is an investment management firm that is a leading provider of portfolio and wealth management solutions. The firm specializes in creating comprehensive investment portfolios and managing client accounts on behalf of professional investment advisors. The firm manages over \$1.8 billion in assets. AP's strategies focus on equity investments, specifically active tax indexing, socially responsible indexing, and factor-based strategies (e.g. dividend tilt strategy).

Additional information on Advisor Partners can be found at [www.advisorpartners.com](http://www.advisorpartners.com).

### **Position Summary/Responsibilities**

Advisor Partners, LLC is seeking a Full-Time Financial Analyst to be responsible for:

- Daily rebalancing of portfolios
- Trading (includes trading in overnight markets)
- Daily account reconciliation. This includes overseeing the daily maintenance of standard and nonstandard custodial and vendor data feeds
- Assist with month-end/quarter-end operational and reporting processes
- Running portfolio/transition analysis as requested by clients
- Working directly with clients to answer questions on performance, portfolio implementation, and how the strategies are constructed
- Working with senior management to analyze and test various aspects of the portfolio construction process
- Spend time on understanding the firm's portfolio construction process along with the strategies the firm has created.
- Over time, the analyst will be responsible for coming up with new ideas to add customizable capabilities to the portfolio construction process and to enhance the trading/operational workflow

### **Minimum Qualifications**

- Bachelor's degree in Statistics, Mathematics, Finance, Economics, Physics, Engineering, or related STEM field
- Working knowledge of portfolio optimizations and statistical modeling
- Strong programming skills (Python preferred)
- Trading experience using FIX connectivity a plus. Must be open to trading in evenings/mornings in overseas markets.
- Experience with MS Office, including Excel
- Ability to communicate clearly and effectively with portfolio managers and clients
- Strong attention to detail; excellent organizational skills and a high work ethic

### **Preferred Qualifications**

- Familiarity with mean-variance optimizations a plus. Experience with applications such as Barra, Northfield, or Axioma a plus.

- Knowledge or familiarity with tax-aware optimizations, socially responsible investing, or factor-based investing

Salary commensurate with experience

Work requires presence in the Walnut Creek, California office

To apply, send a cover letter and resume to [careers@advisorpartners.com](mailto:careers@advisorpartners.com)

Must put **Full-Time Financial Analyst** in the subject line.

Advisor Partners is an Equal Opportunity Employer