



Financial Analyst, CBIZ Financial Solutions – San Diego, CA

CBIZ Financial Solutions is a Registered Investment Advisor comprised of Chartered Financial Analysts, Certified Financial Planners, accountants and other financial professionals with experience in providing Asset Management, Financial Planning, and Estate Planning Services. CBIZ FS provides these services to high net-worth individuals, non-profits, and corporations.

We believe the foundation of a healthy, successful organization is a team of enabled, engaged associates. Therefore, we seek professionals with a true entrepreneurial spirit. The most successful professionals in our organization are those who are ready to accept opportunities to learn, grow, and build their careers.

Corporate info: www.cbiz.com

This is a unique opportunity to join a rapidly growing, team oriented Registered Investment Advisor. Initially, the position will include both investment research (60%) and operational responsibilities (40%). This position will grow to a full investment research position as the firm and individual develops.

KEY EVALUATING FACTORS:

- BS in Finance or a related degree;
- Pass level 2 or 3 of the Charter Financial Analyst (CFA) designation;
- Ability to conduct independent due diligence on mutual funds, separate account managers, and individual bonds;
- Capable of performing portfolio diagnostics of client investment strategies utilizing Bloomberg, Morningstar, and Value Line;
- Experience with equity, bond, and mutual fund trading;
- Capable of articulating a research thesis and the ability to produce a research or market summary report;
- Back office, cashiering, new account and portfolio accounting experience required;
- Experience with Advent Axys is a significant plus;
- 3+ years work experience in a professional service environment, specifically a Broker Dealer or Registered Investment Advisor;
- Demonstrated success in a team environment;
- Ability to learn new tasks and assume responsibility quickly.

If you would like to be considered for this position, please e-mail us a copy of your resume at cbizsd_fs@cbiz.com EOE M/F/D/V

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