

## **Senior Research Analyst, CFA**

Department: Client Services  
Career Type: Full Time  
Location: San Diego, California  
Posted: Monday, August 27, 2007

### **Description**

The candidate will be highly experienced and capable of supervising and participating in mutual fund sub-advisor selection and monitoring, investment proposal generation, as well as public speaking and due-diligence investigation.

It would be extremely helpful if the Senior Analyst had experience with firms like SEI, Dunham, Assetmark, Brinker, Curian, LPL, Commonwealth, Schwab or Fidelity or similar companies.

The candidate will have experience in prospectus and SAI drafting as well as creating commentaries and newsletters. The candidate should be an experienced leader/manager and enjoy working in a team oriented, can-do environment. The ideal candidate will have a strong educational background and should have earned the CFA designation or be a level III candidate. The candidate should be an expert on financial reporting and have high proficiency in MS Office products.

### **Responsibilities**

- Monitor the performance of our sub-advised mutual funds
- Research and identify possible mutual fund managers for our sub-advised funds.
- Conduct due diligence and compliance visits to current and future mutual fund management firms.
- Update and monitor monthly compliance reviews for our mutual funds.
- Supervise the updating of quarterly manager monitoring sheets/universes.
- Supervise the producing and formatting of quarterly market / fund commentaries and highlight sheets.
- Participate in select quarterly conference calls and portfolio manager interviews.
- Assist in writing articles for newsletters.
- Assist in writing research articles
- Supervise the analysis of client portfolios using our proprietary proposal and case analysis platform.
- Supervise the creation of client specific Investment Proposals

### **Desirable Skills**

Excellent communication skills both oral and written, excellent leadership and management skills, organizational, planning, time management, budgeting and market analysis skills.

**Special Requirements**

CFA designation or level III candidate with ten plus years of analyst experience.

**Education**

Bachelor's Degree or above.