



Investment Associate Position Description

Responsibilities:

- The successful candidate will work closely with the Portfolio Manager to conduct investment research through fundamental and quantitative analyses.
- Assist in idea generation and investment research of marketable alternative strategies and multi-asset income securities;
- Provide initial and on-going investment related due diligence including analyzing investment materials and drafting investment summaries;
- Assist in important investment related assumptions, spreadsheets and models supporting the investment decision making process;
- Analyze portfolio construction strategies to identify, quantify and implement best practices across the investment portfolio;
- Prepare for and participate in investment manager meetings;
- Analyze, maintain and improve monitoring process for investment exposures and risks to enhance the investment team's ability to understand and manage risks;
- Assist in the production of research reports, white papers and other ad-hoc reports;
- Must be coachable, willing to learn and adapt to Preserver's research processes;

Minimum Qualifications:

- Enrollment in CFA or CAIA programs is preferred;
- Bachelor's degree in Finance and Economics are preferred, but not required.
- Proficient in PowerPoint and Excel and excellent communication, research, quantitative, and analytical skills;
- Ability to work effectively in a team and be accountable for meeting deadlines;
- Demonstrate initiative and ability to work independently, but be accountable to team goals;
- 1-2 years of experience in financial services or investment settings preferred.

Benefits Include:

- Highly competitive salary depending on relevant experience;
- 401K plan with company match;
- Health, dental and vision coverage;
- Long-term disability insurance;
- Eligibility for bonus and profit-sharing plans after 1 year of employment;
- Hybrid and remote work options;
- Company matching program of charitable contributions.

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