Investment Analyst - Job Posting
Dave Kudsia

Who we are

At Headwaters Financial we help our clients to evaluate their needs and then investigate solutions and implement the best strategies for them. Teamwork is important to us as we're all working together for the benefit of the clients. We're friendly but here to work. We like to hire good, reliable people and let them do their jobs versus having to manage them. We pay well and note that increases in income can be expected as value to the firm increases over time. We are now expanding our team by adding a full-time Investment Analyst role.

The Investment Analyst would work out of our Erin office along with our Investment Associate.

Who you are

You are a qualified individual who loves the stock market, analyzing stocks, funds, ETFs and working with data in general. You have a few years' experience working with investment portfolios and either have your Chartered Investment Manager Designation (CIM) or are enrolled in the CIM program. In addition, you have:

- Strong analytical abilities
- Advanced knowledge of Microsoft Excel
- Exceptional attention to detail

A few 'Nice to have' but not required, include the CFP and/or CFA designation.

What you will be doing

- Investment Analysis
    - Analyze and evaluate all aspects of a client's investment portfolio and make recommendations within existing framework
    - Communicate reasoning for investment choices
    - Ensure all Know Your Product (KYP) and Client Focus Reform (CFR) requirements are in place
    - Create and/or update "sell sheets" for investments (funds, ETFs, stocks)
    - Prepare fund comparisons utilizing MorningStar Advisor Workstation
    - Attend webinars for our mandates and record updates for KYP suitability
    - Proactively meet with product suppliers
    - Conduct investment research and share new ideas for portfolio consideration
    - Track key economic indicators

- Prepare the Advisor for all client meetings
    - Update financial plans in Snap Projections
    - Update portfolios in MorningStar Advisor Workstation
    - Update financial spreadsheet templates such as taxable distributions, client quarterly reports etc.
    - Create client summaries

- General Office Help
    - This is a small office, so we all pitch in where needed including answering the phone
    - Look for ways to increase the service and value to clientele

Please note that Kim Poulin of The Personal Coach will be assisting with this hire. She will be your first line of contact.