

Role: Investment Operations Analyst
Location: Mid-Atlantic Region

Introduction to Zenith

Zenith Wealth Partners (Zenith) is a fee-only investment management and financial planning firm on a mission to combat racial, age based, and gender wealth inequality by delivering comprehensive, high quality, and accessible advice to individuals and institutions. We believe that wealth management does not begin only when a client has accumulated significant wealth. Managing and achieving wealth is an infinite journey. Zenith works with its clients to evaluate the best financial decisions while giving them back time and peace of mind.

Position Summary

In three short years, Zenith has built a high-functioning investment management operation. To continue providing excellent service to our existing clients and help operate a centralized investment management function, Zenith is seeking a driven and mission-oriented Investment Analyst to join our expanding team. The role is hybrid with an expectation to be in Zenith's Philadelphia office at least 3 times per week. Reporting to the Investment Director and as a key member of the investment management team, the Analyst will be responsible for:

- Portfolio Operations
 - Buy, sell and rebalance securities in private client and institutional accounts as needed to reach stated investment objectives and/or maintain a specific investment strategy.
 - Ensure data integrity and quality for information sourced and used to inform investment decisions
 - Collaborate with the Financial Planning team to analyze existing client portfolios and help inform investment proposals for new and existing clients.
 - Create or review Investment Policy Statements for new institutional clients to ensure strategy aligns to intended objectives.
 - Produce quarterly performance reports for individual and institutional clients
 - Establish and manage the firm's investment performance composites
- Assist in Generating Best-In-Class Investment Options
 - Build database and complete due diligence on minority led investment funds
 - Formulate new investment ideas on a regular basis to help ensure model portfolios are achieving optimal results.

Desired Knowledge & Skills

- 1-3 years of investment management experience; broad understanding of capital markets
- Bachelors' degree from an accredited institution
- Series 7, 66 or Series 65 certifications or obtained within 6 months of start
- Detail-Oriented – You sweat the small stuff and take pride in your work
- Curious – You have a thirst for learning and eager to continue developing as a professional
- Translator – You can take a complex idea and make it easy to understand
- Structure – You prefer to create and execute processes that are repeatable and scalable
- Unselfish – You enjoy partnering with others in pursuit of a larger goal, not personal successes

Compensation & Perks

Zenith embraces a high-performance culture and seeks to reward employees that deliver exemplary results. The position will earn a competitive base salary of \$70,000 - \$80,000 based on experience and certifications with the potential to earn an annual performance incentive.

To deliver your best performance, we believe it is critical that you invest in self-care. Company benefits include (20) days paid time off, one day off to celebrate your birthday, and an additional (10) holidays observed by the NYSE. Additionally, employees will have access to health benefits (e.g., medical, and dental insurance). Finally, Zenith will provide you with a company-owned laptop for your work.

Zenith prides itself on being a supportive workplace dedicated to employees' personal and professional growth. Zenith reimburses all employees for up to \$1,000 to engage in continuing education. In addition to this firm-wide annual stipend, Zenith is open to providing financial assistance and schedule flexibility to an employee in this role interested in pursuing a Chartered Financial Analyst (CFA) or Chartered Alternative Investment Analyst (CAIA) designation.

Zenith provides equal employment opportunities (EEO) to all employees and applicants for employment without regard to race, color, religion, sex, national origin, age, disability or genetics. In addition to federal law requirements, Zenith complies with applicable state and local laws governing nondiscrimination in employment in every location in which the company has facilities. This policy applies to all terms and conditions of employment, including recruiting, hiring, placement, promotion, termination, layoff, recall, transfer, leaves of absence, compensation and training.

Pre-employment background checks will be conducted for candidates offered employment.

Next Steps

We would love to hear from you and will be collecting candidate materials on a rolling basis.

Please submit your **resume** and a **short note to let us know what inspired you to apply** to Talent@NetworthZenith.com.