

Role: Investment Analyst
Location: Mid-Atlantic Region

Introduction to Zenith

Zenith Wealth Partners (Zenith) is disrupting the wealth management industry 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 provides a flexible financial planning and investment management approach that inspires our clients to take financial action.

Position Summary

To provide excellent service to our existing clients and help fuel the next wave of growth, Zenith is seeking a driven and mission-oriented Investment Analyst to join our team. Of note, we have seen significant interest in our ability to help institutional partners such as Nonprofits and Foundations align their capital with their values. This role is a great fit for an individual that aspires to serve intentional clients (families and institutions) and help grow Zenith's reach. Reporting to the Chief Investment Officer and as a key member of the investment management team, the Analyst will be responsible for:

Portfolio Management

- Ensure our managed assets are invested in accordance with a client's stated financial objectives and/or investment policy statement.
- Produce periodic performance reporting for clients, including policy update and market expectations, to help clients stay informed and ensure the strategy remains aligned to their intended objectives.
- Attend select client meetings to add perspective and complement our team of advisors
- Manage the firm's investment performance composites.

Generating Best-In-Class Investment Options

- Complete due diligence on new investment products - equities, fixed income, currency, and alternatives to help clients meet their investment objectives.
- Conduct capital market research to establish expectations (risk, return, etc.) that inform our portfolio management approach.
- Monitor and analyze earnings and other notable announcements for existing client holdings
- Formulate new investment ideas to help ensure portfolios are achieving optimal results.

Content Creation & Education

- Partner with Marketing team to create digestible investment-related content and market commentary to educate and inspire Zenith's clients and prospects
- Facilitate the design and delivery of Zenith's Quarterly Market Insights webinars

Desired Knowledge & Skills

- Years of investment management experience; broad understanding of capital markets
- Bachelor's degree from an accredited institution
- Series 7 & 66 or Series 65 certification (or on track to secure within first 6 months)
- 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 rewards employees who deliver exemplary results. The position will earn a competitive base salary and annual performance incentive based on experience and certifications.

To deliver your best performance, we believe you must invest in self-care. Company benefits include (15) days paid time off, one day off to celebrate your birthday, and an additional (15) company holidays. 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 becoming a Chartered Financial Analyst (CFA) or Chartered Alternative Investment Analyst (CAIA).

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 use the Apply Now button on the Careers page of our website to submit your cover letter, resume, and preferred contact information.