



PENSION

consultants inc.

JOB DESCRIPTION

Position:

Research Analyst

Department:

Investment Services

Reports To:

Director, Investment Services

Salary:

Salary is commensurate with education and experience as detailed on the approved pay scale. All Pension Consultants, Inc. employees are salaried professionals.

Incentive Plan:

This position does have an incentive plan based upon objective measurements and subjective criteria. The details of the incentive plan are available separately.

Overall Purpose:

Responsible for the comprehensive review, analysis and recommendation on differing pooled investments. In addition, this position will stay abreast of changing economic and investment conditions and will be responsible for proactively advising both the firm and its clients about possible ramifications and solutions. A thorough understanding of security regulations and the impact on qualified retirement plans is instrumental. The candidate will work in a fast pace, demanding environment while being expected to meet strict deadlines. Under general supervision, this position has a wide-range of decision making authority in fulfilling accountabilities.

Duties & Responsibilities:*General Operations*

- Complete assigned research on time and with the highest quality.
- Present investment research to clients.
- Present and explain investment and economic concepts and theories to both employees and clients.
- Properly document all research projects.
- Stay abreast of current economic and investment related events and identify possible implications.
- Assist with miscellaneous projects as requested.

- Pursue the Mission of the firm and demonstrate the Guiding Principles in all interactions with stakeholders of the firm and the public.
- Be a thought leader in the area of investment services and advice.

Research

- Qualitatively review, evaluate and make appropriate investment recommendations based on the Investment Services Guiding Principles.
- Evaluate and make recommendations on cash equivalent vehicles to include alternative investments and analysis of the underlying portfolios.
- Compare and contrast differing pooled investments with similar investment objectives; including purchase/sell strategies, investment philosophies and fundamental/non-fundamental policies.
- Research individual Portfolio Managers in order to obtain an understanding of their education level, experience and role within the overall management of the portfolio.
- Understand each Investment Adviser in terms of their research structure, investment management, compensation and regulatory compliance.

The above statements are intended to describe the general nature and level of work performed by employees within this position. It is not designed to contain or be interpreted as a comprehensive list of all duties, responsibilities and qualifications required of the employee assigned to this job.

Talents

Striving Talents

- Competence: A need for expertise or mastery
- Belief: A need to orient your life around certain prevailing values

Thinking Talents

- Responsibility: A need to assume personal accountability for your work
- Concept: An ability to develop a framework by which to make sense of things
- Strategic Thinking: An ability to play out alternative scenarios in the future
- Formulation: An ability to find coherent patterns within incoherent data sets
- Gestalt: A need to see order and accuracy
- Discipline: A need to impose structure onto life and work

Relating Talents

- Positivity: A need to look on the bright side
- Persuasion: An ability to persuade others logically

Skills

- Substantial knowledge of investment products.
- Thorough knowledge of investment and economic theories.
- Effective communication skills, both verbal and written.
- Proficient with Microsoft Office.

Experience & Education

- Bachelor's degree required. Preferred Business, Financial or Economic degree.
- Pursuing or willingness to pursue Chartered Financial Analyst designation.

- Current Series 7 and Series 63 Licenses.
- Five years Investment industry experience with progressive responsibilities.

About Pension Consultants, Inc.

Pension Consultants, Inc. is an innovative pioneer in objectively managing and evaluating all facets of employer-sponsored retirement plans. We are an independent advocate for our clients and provide proactive, in-depth research, attentive supervision and advice on all matters relating to ERISA, investments, participants and vendors.

www.pension-consultants.com

Interested candidates should mail, fax or email a resume to:

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