



PENSION

consultants inc.

JOB DESCRIPTION

Position:

Research Assistant

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.

Overall Purpose:

Responsible for assisting in general operations of the Investment Services Team as well as specific duties within the Research Team. Under direct supervision, has limited decision-making authority in fulfilling accountabilities.

Duties & Responsibilities:*General Operations*

- Compile, print and bind all requested reports
- Accurately and appropriately organize investment research and client files: both electronic and physical
- Perform electronic file maintenance on investment files upon request.
- Track and update all Investment Policy Statements (IPS) ensuring proper documents are signed by the client and that the Investment Services Program is updated to reflect the most current data.
- Assist in the updating of Asset Allocation Models (AAM). Make appropriate changes, save and document changes, and distribute to appropriate Relationship Manager.
- Process Investment Search Methodologies (ISM). Ensure that all ISMs are properly signed, filled out completely and recorded in the Investment Services Program.
- Assist in the preparation of client meetings.
- 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

- Complete pre-research checklist for given research projects.
- File completed research in appropriate files.
- Print Search Findings and applicable reports.
- Create Asset Allocation Model Fact Sheets.
- Update Investment Policy Statements.
- Gather pertinent data.
- Assist with miscellaneous data gathering projects when requested.

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

- Service: A drive to be of service to others.
- Ethics: A clear understanding of right and wrong which guides your actions.
- Competence: A need for expertise or mastery.

Thinking Talents

- Responsibility: A need to assume personal accountability for your work.
- Gestalt: A need to see order and accuracy.

Relating Talents

- Team: A need to build feelings of mutual support.
- Positivity: A need to look on the bright side.

Skills

- Working knowledge of basic investment concepts.
- Organized and detail oriented.
- Proficient in all aspects of Microsoft Office.

Experience & Education

- Bachelor's degree required.
- Series 7 and 63 Licensed.
- Experience in research related to the Investment industry.

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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