



Portfolio Analyst

The Portfolio Analyst (PA) plays a critical role in the delivery of investment and wealth management services to our clients. This position involves multiple responsibilities and opportunities for further growth. The PA directly supports a Wealth Manager on the day-to-day requirements of managing client investment portfolios, including portfolio analysis, cash management, portfolio construction, trading, and tax-loss harvesting.

Job Specifications:

- Assist in setting, implementing, and monitoring the portfolio strategy set for each client portfolio based on their investment objectives, risk tolerance, and financial goals;
- Execute daily aspects of portfolio management such as preparing portfolios for trading and rebalancing, reviewing portfolio's asset allocation versus targets, recommending trades and portfolio rebalances based on the direction of the Wealth Manager;
- Oversee daily account cash flows;
- Assist with the client onboarding and account set-up process;
- Assist with updating each account's Investment Policy Statement;
- Assist with client meeting preparations;
- Provide support on all aspects of the client relationship under the direction of the Wealth Manager.

Qualifications

The ideal candidate will have earned an undergraduate degree and concluded 3-5 years of work experience in a Client Service Associate or Portfolio Associate role in the investment or wealth management industry. Progress towards, or interest in, the CFP designation (or CFA) is a requirement of the position. The successful candidate will display a high level of energy and commitment to wealth management, have strong analytical and problem-solving skills, and be detail-oriented. The candidate will also be recognized by colleagues met during the interview process as one who is likely to thrive in and contribute to our collegial and mutually supportive culture.

BFM offers a hybrid work environment whereby employees are expected to be in the office a minimum of 3 days per week. Company equipment will be provided so that the employee can effectively work remotely.

Compensation for this position is commensurate with experience. BFM offers an attractive set of health and other employee benefits, including a 401k program.

Interested candidates should send their resume and cover letter to: resumes@bfminvest.com.