



## Research/Portfolio Analyst

We are seeking a motivated and detail-oriented entry-level Research/Portfolio Analyst for our fee-only wealth management firm in Las Cruces, NM. Such an individual will desire to work in a team-oriented independent RIA firm; will be involved in all aspects of the business, learning and assimilating the way we care for our clients. Candidates that fit into our firm and culture should embrace technology, enjoy a collaborative environment, and venerate serving clients in a fiduciary capacity.

### Position Highlights

The Research/Portfolio Analyst will play a crucial role in the firm's daily operations, back-office technology, client reporting process, and client experience. Operating in a ever-changing environment, the analyst team aims to effectively monitor, evaluate, and manage the clients' assets while mitigating risks.

### Specific Areas of Focus Include:

- Using portfolio management strategies to optimize client's portfolios, improve operation efficiencies, risk reporting for both clients and regulatory purposes.
- Providing investment research for portfolio management.
- Special project assistance to investment advisors.
- Execute, process, and reconcile trades and other investment related transactions.
- Ensure all transaction processing follows internal procedures and compliance regulations.

### Qualifications

- B.A. or B.S. degree, preferably in Finance, Accounting, or Economics
- 2+ Years of experience in the Financial Services Industry (Control, Regulatory, Risk, Compliance, or Internal background preferred) is preferred
- CFA® designation or equivalent work experience preferred
- Excellent verbal, written, analytical, and organizational skills
- Strong sense of ownership, ability to prioritize, and work quickly and accurately
- Ability to identify, meet, and follow through with client needs and requirements with keen attention to detail
- Excellent project management skills with ability to prioritize and track multiple tasks.
- Proficiency in Microsoft Office Suite
- Knowledge of CRM (i.e., Junxure), eMoney Guide Pro, FINRA 65, and Black Diamond a plus

### Perks

- Competitive compensation and benefits
- Reimbursement of approved professional development expenses
- Customized career development process
- 401(K) and company matching
- Health care benefits

**Westwind Capital, LLC is an Equal Opportunity Employer**

Las Cruces, NM (575) 556-8500 | Denver, CO (720) 339-0855

[www.wv-capital.com](http://www.wv-capital.com)